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# BUILDING RESISTANCE TO BRAND SWITCHING DURING DISRUPTIONS IN A COMPETITIVE MARKET: AN IDENTITY THEORY PERSPECTIVE

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**BUILDING RESISTANCE TO BRAND SWITCHING DURING  
DISRUPTIONS IN A COMPETITIVE MARKET: AN IDENTITY THEORY  
PERSPECTIVE**

By  
**Dominic Appiah**

*This thesis is submitted to the University of Plymouth in partial fulfilment for the  
degree of*

*DOCTOR OF PHILOSOPHY*

**April, 2018**

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## **Dedication**

Dedicated to my parents, Albert Kingsley Appiah and Janet Dansoa (of blessed memory).

To my lovely partner, Candace, and our sons Lenny and Leon, whom I have leaned on for the four years of this PhD journey.

To my supervisors, Professor Kerry E. Howell and Professor Wilson Ozuem. This thesis would not have been completed without your unrivalled knowledge, expertise and time.

## **Abstract**

*The impact of identity on brand loyalty has taken precedence as an area of focus in recent marketing research. This has taken place in an era defined by technological revolution, which has created market disruptions and there are implications for customer–brand relationships. Nonetheless, the extant literature on brand loyalty does not extensively acknowledge the impact of socio-psychological attributes but rather functional utility maximisation. The brand loyalty literature has the notion that the perceived value of a brand is conceptualised and operationalised as a functional utilitarian value.*

*Knowledge that illuminates how firms can reposition themselves to sustain brand loyalty when disruptions occur in today's complex and globalised business environment is explored in this study, through empirical investigation into the phenomenon of brand switching behaviour among consumers in a specific competitive market, namely, the Smartphone Industry. The current study explores how resistance could be built from an identity theory perspective. As highlighted above, much emphasis has historically been placed on the functional utility of products at the expense of social meanings.*

*Given the relative paucity of literature on identity and brand loyalty, this study adopts a grounded theory methodology based on a survey and a series of in-depth interviews across Ghana and the UK to access consumers' insights and experiences of specific brands in the Smartphone industry. Interviews were recorded, transcribed and coded, utilising the three-stage process of analysing data; specifically, open, axial and selective coding. This study is the first to combine brand loyalty literature, identity theory and grounded theory to study the behaviour of brand switching in the Smartphone Industry.*

*This study identified a gap in knowledge in the brand loyalty literature, as it focuses only on how brands perform under normal market conditions. Hence, this study provided consideration for market disruptions in the Smartphone industry. Empirical data from Smartphone users confirmed in this study that underlining factors which are non-utilitarian factors such as socio-psychological benefits, motivate consumers to continue buying the brands they buy.*

*The study also established that the sustainability of brand loyalty could be accomplished from an identity theory perspective by adapting and advancing a customer–brand identification (CBI) model, to examine the phenomenon of brand switching in the Smartphone industry at a more matured and competitive stage.*

## **List of Abbreviations**

<b>Acronym</b>	<b>Full Term</b>
BSP	Brand Switching Proponents
CBI	Customer-Brand Identification
CEO	Chief Operating Officer
NASDAQ	National Association of Securities Dealers Automated Quotations
NYSE	New York Stock Exchange
OS	Operating Systems
SI	Symbolic Interactionism
SIT	Social Identity Theory
SCT	Self-Categorisation Theory

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## **Author's Declaration**

At no time during the registration for the degree of Doctor of Philosophy has the author been registered for any other University award.

The following publications and activities were undertaken in connection with the programme of study:

- Appiah, D. and Ozuem, Wilson. (2018-Forthcoming). Disruptive Technology in the Smartphone Industry: Identity Theory Perspective. Wilson Ozuem and Gordon Bowen (2018) In Leveraging Computer-Mediated Marketing Environment. IGI Global. Hershey
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- Appiah, D. and Ozuem, W. (2018). Issues and the Importance of Branding, Brand Personality and Symbolic Meaning of Brands in the Smartphone Industry. Zuopeng (Justin) Zhang (2018) In Global Information Diffusion and Management in Contemporary Society. IGI Global. Hershey
- Participated in the Global Business and Technology Association (GBATA) conference held in Vienna, 2017 and presented a paper titled "Brand Switching in the Smartphone Industry: A Preliminary Study"
- Participated in the Global Business and Technology Association (GBATA) conference held in Dubai, 2016 and presented a paper titled "Towards a Sustainable Brand Loyalty: Attitudinal Loyalty Perspective"

- Participated in the seventh International conference held in Albania, 2015, and presented a paper on “Building Brand Loyalty: Identity Theory Perspective”
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- a) *Introduction to SPSS*
- b) *The transfer process*
- c) *Project management*
- d) *Excel essential feature*
- e) *Introduction to Nvivo*
- f) *Introduction to Endnote*
- g) *Overview searching and accessing info resources*
- h) *Making progress: Avoiding defeatism and self-sabotage*
- i) *PowerPoint create and enhance your presentation*
- j) *Intellectual property rights*

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A handwritten signature in black ink, consisting of a series of loops and a long horizontal stroke extending to the right.

Dominic Appiah

April, 2018

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# CHAPTER ONE

## INTRODUCTION TO THE STUDY

### 1.1 Enquiry Overview

This thesis consists of nine chapters, the first of which comprises an Introduction setting out the research aims and objectives, the background of the study including the rationale, and the research questions. A background of the Smartphone market of the United Kingdom and Ghana is explored before the context and significance of the study is explained. The chapter concludes by providing the statement of the research scope.

*Chapter Two: Literature Review* of branding as a concept, initially provides conceptual clarifications of brands and it then goes on to discuss the origins and meanings of brands and their benefits to the consumer and organisation. In addition, the chapter explores the brand loyalty literature, brand switching and two perspectives to switching behaviour. Brand switching as functional utility maximisation and brand switching as social mobility are the two concepts that are explored. Finally, the research gap found in the brand loyalty literature is highlighted and discussed while innovations and market disruption in the context of this study is elaborated.

*Chapter Three: Identity Theory Literature* establishes the theoretical underpinning of the study which involves identifying various definitions of identity. The chapter also looks at Goffman's contributions to identity conceptualisation, before providing a discussion on structural symbolic interactionism. The foundations of identity theory are

then highlighted. Stryker (1980), Mead (1934) and Burke's (1977) work are explored in relation to symbolic interactionism.

The chapter further elaborates on the marketing implications of identity theory for brands, as well as the impact of brands on consumer identification. It explores the impact of consumer identities on brands. Finally, the chapter sheds more light on the theoretical framework designed for this study before drawing conclusions.

*Chapter Four: Conceptual Framework* introduces the background to the CBI model proposed for this study, and its antecedents in the context of the Smartphone industry at its matured and competitive stage. The three focal drivers of CBI, namely perceived quality (the instrumental drivers), brand association or self-brand congruity (the symbolic drivers) and the brand loyalty, brand advocacy and resilience (satisfaction drivers) are examined and explained. The chapter then provides a critical review of the Lam et al.'s (2013) CBI model, and explores the rationale and justification behind the decision to adopt and advance the model for this study.

*Chapter Five: Research Methodology* provides an understanding of the paradigm of inquiry. This is achieved via a review of major research paradigms and various research strategies.

The chapter discusses grounded theory into some detail. The data collected for the research is analysed using grounded theory, which is a process of reducing raw data into concepts designated to represent categories. The categories are then developed and integrated into a substantive theory (Strauss and Corbin, 1998; Howell, 2013). This process is achieved by coding data, writing memos, and formulating diagrams.

The data collected were coded and analysed using the three coding methods of the grounded theory model of open coding, axial coding and selective coding.

The methodology is underpinned by a constructivist (phenomenological) paradigm aimed at developing substantive theory to further our understanding of theory as well as of the empirical nature of building resistance to brand switching from an identity theory perspective. The chapter identifies the constraints of grounded theory, highlighting significant differences between Glaser and Strauss. It then provides a justification for the choice of paradigm for the study.

*Chapter Six: Data Collection and Grounded Theory Coding Procedure* provides an account of data collection methods such as semi-structured interviews, survey questionnaires and secondary sources used, as well as their application to the research and coding procedures for this study. This is followed by a discussion of the judgemental sampling. This was found suitable for this study as the participants are selected by the researcher on the strength of their experience of the phenomena under study.

Grounded theory entails the discovery of theory through the systematic collection, analysis and comparison of data. For this study, data was gathered from participants from Ghana and the UK through semi-structured in-depth interviews and survey questionnaires. A total of 74 participants drawn from across the UK and Ghana took part in the data collection exercise.

All interviews and the survey were conducted electronically, via Skype and Qualtrics respectively. In addition to the above primary methods, data were also drawn from a review and analysis of journal articles and books.

*Chapter Seven: Data Presentation and Analysis: Open Coding* presents a detailed analysis of both the in-depth semi-structured interviews and the open-ended survey questionnaire data. Through the application of the grounded theory procedures of data collection and data analysis, concepts were discovered question-by-question for an objective comparative method focusing on theoretical concepts. An open coding analysis of both the semi-structured interviews and the survey questionnaire was conducted based on an appropriate theoretical framework. This resulted in a number of incidents, which were grouped and constantly compared for similarities and differences to produce concepts.

These concepts are identified based on an analysis of data from the interview questions and survey questionnaires. Concepts that emerged from both the interviews and the survey questions were simultaneously compared until no new concepts were identified.

The analysis resulted in the emergence of seven open categories, each of which is discussed in terms of its properties and dimensions as these related to data on brand loyalty and switching behaviour linked to the identity theory perspective. The open categories are rearranged in a different way with the purpose of discovering how they could be axially related. Axial coding typically follows the open coding process. Axial coding in terms of a Grounded Theory approach enables categories to be linked at the level of properties and dimensions.

*Chapter Eight: Analysis of Data: Axial and Selective Coding* presents the axial and selective coding processes with the aim of developing a substantive theory of resistance to brand switching from an identity theory perspective. The detailed body of data generated a number of concepts, which were grouped into categories. Data

from the interviews were de-contextualised and analysed in relation to the phenomena that had emerged. The interrelationships between the open categories were established. The axial coding process established the interrelationships among the phenomena and illustrated the characteristics of each phenomenon using the paradigm model.

The axial coding process identified six main categories, namely: market disruptions, brand switching, brand loyalty, brand advocacy, customer satisfaction and strategies (identity). The application of the paradigm model discussed the open categories and their properties, illuminating causal conditions, actions and interaction strategies and their consequences.

Subsequent to axial coding, the selective coding process presents a synthesis of the insights gained during the analytic processes of open and axial coding. Selective coding is the “process of selecting the core category and systematically relating it to the other categories” (Strauss and Corbin, 1998). Brand switching was identified as the core category. The final step in the selective coding process was the creation of a narrative titled “Resistance to brand switching from an identity theory perspective” that articulated the grounded theory.

*Chapter Nine: Conclusions: Building a Substantive Theory, Contributions and Future Research* brings the study to a close by considering a summation of the substantive theory and its implications for this study. This is achieved through a combination of the social constructivist approach using a grounded theory methodology. It has implications for understanding brand switching in competitive markets like the Smartphone industry. Finally, this chapter elucidates the theoretical and managerial contributions the study makes to knowledge and directions for future research.

## **1.2 Rationale for the Study**

The plethora of research on brand switching covers customers' intentions to assess possible substitutes of a particular product category to maximise the functional utility of product attributes and the marketing mix (Guadagni and Little, 1983; Seiders and Tigerts, 1997; McFadden 1986).

Nonetheless, the extant literature in the above stream of research fails to acknowledge the impact of socio-psychological attributes besides functional utility maximisation (Rao et al., 2000; Tajfel and Turner, 1979; Ashok et al., 2002; Swait and Erdem 2007; Lam et al., 2013; Oswald, 1999; Chaplin and Roedder, 2005; de Chernatony and MacDonald, 1992; Sweeney & Soutar, 2001). This research presents an empirical investigation into the phenomenon of the brand switching behaviour of consumers in a competitive market, with implications for how resistance could be built from an identity theory perspective. As highlighted above, much emphasis has historically been placed on the functional utility of products at the expense of social meanings. With expectations of product function, insufficient attention has been paid to the socio-psychological attributes and personal and social meanings of brands (Rao et al., 2000; Tajfel and Turner, 1979; Ashok et al., 2002; Swait and Erdem, 2007; Lam et al., 2010, 2013; Oswald, 1999; Chaplin and Roedder, 2005; de Chernatony and MacDonald, 1992; Sweeney & Soutar, 2001). The basic assumption underlying this study is that people are constantly involved in social interactions and interpreting their constantly changing world. Hence this study deviates from the traditional economic viewpoint of dealing with brand switching as functional utility maximisation (Guadagni and Little, 1983; Seiders and Tigerts, 1997; McFadden, 1986; Appiah & Ozuem, 2018), to treating brand switching as a consequence of social mo-



bility between brand identities amongst consumers (He et al., 2012; Lam et al., 2013).

First, the study explores the existing literature on brand loyalty and identity theory to examine the effects of identity on customer loyalty. Despite extensive studies on brand loyalty (Anderson and Narus, 2004; Ozuem and Lancaster, 2012; Zeithaml, 1998; Ozuem, Thomas, & Lancaster, 2016), minimal research have been carried out to establish how market disruptions impact negatively customer-brand relationships and strategies companies may adopt to gain competitive advantage by repositioning themselves to sustain brand loyalty when disruptions occur in today's complex and globalised business environment (Lam et al., 2010). Although the loyalty literature offers valuable understanding of customer-brand relationships, two limitations trigger the need for critical investigation (Lam et al., 2010; 2013).

1. Sustainability of brand loyalty predictors refers to resisting both time and market disruptions (*ibid.*). However, the brand loyalty literature tend to concentrate on the performance of brands within normal market conditions with less consideration for current complexities (Keller and Lehmann, 2006; Ozuem, Thomas, & Lancaster, 2016), market disruptions become more prevalent.
2. Another limitation arises when we consider the perceived value of brands when conceptualised and operationalised as functional utilitarian values. This is prevalent in the brand loyalty literature, which does not capture other non-utilitarian factors such as socio-psychological benefits that might motivate customers to continue buying (Solomon, 1983; Gardner and Levy, 1955; Holbrook and Corfman, 1985; Bagozzi, 1975; Richins, 1994; Sheth et al., 1991; Sweeney and Soutar, 2001; Hsu and Liou, 2017).

Secondly, this study builds upon the loyalty literature by considering the limitations identified above, to further develop and extend Lam et al.'s (2013) framework known as the consumer–brand identification (CBI) model, to examine the issue of brand switching in a specific market disruption, namely the introduction of a radically new brand due to innovation in the technology industry and specifically the Smartphone industry. The CBI model developed by Lam et al. (2013) is adapted and advanced for this study to support the antecedents of consumer–brand identification in the Smartphone industry at a more matured and competitive stage. This sector was selected as the product category for this study because it represents a context in which brand switching is most likely to occur because of the multiple alternatives and short inter-purchase frequencies that identify it (Campo et al., 2000; Goldsmith, 2000; Jung, Hung and Ho, 2017). Notably, the market for Smartphones is probably the most dynamic of any in the world, and the degree and rate of change in the technology and product innovation disrupting the market is staggering (Azize et al., 2013; Cecere et al., 2015).

Thirdly, there has been no research carried out to study the phenomenon of brand switching from an identity theory perspective that utilises a grounded theory methodology. Such an approach could provide useful insights into this area and could help build a substantive theory to serve as a basis for future research. The study could also benefit organisations from a managerial point of view, especially brand and customer relationship managers who must devise customer relationship strategies to achieve a sustainable competitive advantage (Sirgy, 1982; Da Silveira, et al., 2013; Stokburger-Sauer et al., 2012; Lam et al., 2013).

### 1.3 Research Aims and Objectives

The purpose of this research is to carry out an investigation into identity theory and brand loyalty to empirically examine the effects of identity on customer loyalty and the switching behaviour of customers. There are clear implications to marketers.

This research has three purposes as follows:

- Firstly, this study explores identity theory and brand loyalty to propose the conceptual framework around Customer-Brand Identification, (hereafter CBI). Following Lam et al. (2013), CBI is thus defined for the purposes of this study as “a consumer’s psychological state of perceiving, feeling, and valuing his or her belongingness with a brand” (p. 235).

Lam et al. (2010; 2013), establish that CBI is not the same as brand loyalty because not every customer makes a repeat purchase of a specific brand without switching, significantly identifying with that brand. What that means is that such customers inhibit polygonal relationships with the brand; hence brand loyalty in that circumstance may be motivated by functional value or avoidance of switching costs, instead of customer identification with that specific brand. The latter clarification established here is what instigates this study.

- Secondly, the current study combines identity theory and the loyalty literature to propose a conceptual framework of switching behaviour as both functional utility maximisation and social mobility of customers between specific brands they identify with. Specific antecedents are derived as “relative CBI” (symbolic driver) and “relative perceived value” (instrumental driver), seen as the extent to which a consumer trusts a certain brand’s identity, finding that it has a

greater self-relevance and that its utilitarian value exceeds that of substitute brands in the same product category.

- Thirdly, the framework is examined in the context of the Smartphone industry, using data collected from Smartphone users from across the UK and Ghana to provide empirical evidence with implications for the effect of identity on brand switching behaviour and its unique role in building resistance to switching during market disruptions in a competitive market. A cross-country analysis seeks to understand the phenomenon of brand switching within two contrasting national contexts.

The main strengths of this approach stem from the observation that switching behaviours in one context can often be influenced by various factors that remain constant in other contexts. The focus is on unearthing common factors underlining brand switching with empirical data across countries.

## **1.4 Research Questions**

Existing literature on brand loyalty offers rich and useful insight into customer-brand relationships. For example, Lam et al. (2011; 2013) holds the opinion that the brand loyalty literature largely concentrates on brands' and how they perform based on regular market situations; however as the business environment evolves into a more complex and globalised, market disruptions become inevitable.

Brand value is mainly perceived and conceptualised in terms of functional utility, hence it does not capture other non-utilitarian factors such as socio-psychological benefits that motivate customers to repurchase what they buy (Gardner and Levy, 1955; Farhana, 2014). However, according to Aaker (1995; 1999) and Leckie et al. (2016), the brand literature exposes the fact that brands offer self-definitional incen-

tives beside the utilitarian ones. The multidimensional nature of customer-brand relationships raises four important questions for this study.

- a) Do customers stay loyal or switch brands only to maximise functional utility?*
- b) Is there an underlying customer-brand relationship mechanism that drives brand loyalty in the face of market disruptions?*
- c) Does the brand image give consumers recognition or reflect their personality?*
- d) Do consumers continue to buy their preferred brand and recommend it to others irrespective of price change?*

### **1.5 Overview of the Smartphone Markets in the UK and Ghana**

There has been a huge increase in the number of Smartphone users recently as it is widely used as a communication tool that connects users through voice calls, text messages, emails and social networking sites for entertainments (Wang et al., 2014; Kim et al., 2016; Tan et al., 2017). The Smartphone is a multi-functional device which, apart from its telephone functionalities, has a wide range of applications such as e-mail, Internet, calendar, notepads and in-built cameras (Norazah, 2013; Wang et al., 2014). The Smartphone is a significant shift from the traditional mobile phone and a major difference between the two is that various applications can be added after the purchase of the Smartphone device, whereas they cannot be added to the latter. Hence Smartphones are considered radically innovative products due to extra characteristics which make them similar to mini computers.

The evolution of the Smartphone has impacted significantly on consumer behaviour and choice. The use of mobile phone technology was initially introduced and used for communication purposes but recently advanced to include additional features that have created a greater market and altered consumers' purchase behaviour (Slawsby

et al., 2003; Dwivedi, 2015). Users of mobile phones expect other features such as media support, internet connectivity and special applications in this modern era of technological advancement (Jones, 2002; Hansen, 2003; Norazah, 2013). There is the need to emphasise that recently, Smartphones appeals to a range of consumers of varying ages. Exceptional characteristics of hardware and software components have largely contributed to the impact on customer preferences and purchase intentions, allowing technology firms to innovate features of new products creating a competitive setting.

The dramatic expansion and increase in the use of Smartphones has drawn attention from academics and researchers (Park and Yang, 2006; Wang et al., 2014; Kim et al., 2016; Yeh et al., 2016; Tan et al., 2017), and special features in Smartphones have created greater perception and expectations (Edell and Burke, 1987; Aaker, 1997; Dickinson et al., 2014; Wang et al., 2014; Tan et al., 2017). The significant component of the Smartphone that drives demand and helps manufacturers maintain a strong influence in the Smartphone market is the operating system (OS). There are many software operating systems including iOS (Apple), Android (Google), Windows (Microsoft), Symbian (Nokia), and RIM (Blackberry). Innovations in hardware and software have triggered enormous growth in the Smartphone market (Tan et al., 2017), since the multi-functional operations in these devices generate trust in technology that consumers expect. Trust in Smartphone devices and their features ultimately adds brand recognition and this is the primary factor that affects intentions to purchase (Nah et al., 2003).

### **1.5.1 Market Structure**

The Smartphone market has experienced strong growth in recent years mainly due to technological advancement in the industry (Tang et al., 2017; Yeh et al., 2016; Kim et al., 2016). A MarketLine (2017) report confirmed an impressive volume of 1,349.6 million sales of Smartphone units in 2016, which according to the report represents 92.7 per cent of the market's overall volume in the mobile phone industry as compared to ordinary mobile devices with a sales volume of 106.3 million units, paralleling 7.3 per cent of the market total, in the same year.

The current global Smartphone market continues to be dominated by a small number of large technology firms such as Apple, Samsung and Huawei. Apple's Smartphone share of the smartphone market continues to widen globally, after low patronage of Android devices. It realised \$215,639 million in revenue 2016. Samsung has seen its share of the market dropped globally with the Tech giant retaining revenues of \$172,840 million in the year 2015, a decrease of 2.7 per cent compared to the fiscal year 2014, while Huawei overtook it leaping closely behind Apple. Huawei's consumer business segment develops, manufactures and sells a range of Smartphone devices. The company recorded \$59,453 million revenue in 2015 (MarketLine, 2017).

In spite of the significant growth in the industry, the Smartphone market is changing with severe threats facing it (Felix, 2015; Tang et al., 2017). Manufacturers leverage their own competitive advantage to enable them to maintain their position in the market with a positive brand image, exploring new revenue streams and, most importantly, achieving a sustainable product differentiation to drive sales (Gartner, 2016; Yeh et al., 2016; Kim et al., 2016). The UK economy continues to be a huge market for Smartphone manufacturers. Apple recorded a high share of Britain's

Smartphone market in 2014 as iPhones sales accounted for 39.5 per cent. The main contributing factor to Apple's market share increase is the introduction and launch in September 2014, the iPhone 6 and iPhone 6 Plus.

On the other hand, however, Ghana, the West African country on the Gulf of Guinea, has emerged as one of the fastest-growing economies due to its offshore oil and gas reserves and investment opportunities in infrastructure development (Frost and Sullivan, 2016). It is recognised as one of the 20 markets of the future with great opportunities for consumer electronics including Smartphones due to urbanisation, natural resources and commodity exports (Euromonitor.com).

Consumers in Ghana have become highly dependent on Smartphone usage, especially as healthcare providers in Ghana are increasingly adapting to recent technology innovation by offering health services and sharing information remotely (Frost and Sullivan, 2016), along with the introduction of mobile money transactions and the rise in social networks.

As part of its policy, the Ghanaian government hopes to digitise healthcare to ensure that Ghanaians, especially those in the rural areas of the country, benefit by enabling better access to important information that will bring about better decision-making for improved healthcare outcomes. To enforce this, the government has invested in telemedicine and electronic health records (EHR), and this development serves as one of the major drivers for industry growth (Frost and Sullivan, 2016).

As part of the Ghana government eHealth initiative, the Columbia University Mailman School of Public Health, the Grameen Foundation and the Ghana Health Service (GHS) launched Mobile Technology for Community Health (MOTECHE), which is ex-



pected to further develop health outcomes for mothers. To achieve this, MOTECH advanced two apps, known as Mobile Midwife and Nurses Application. These mobile apps ensure that patients have access via Smartphone to data entered by nurses which is then shared and cross-verified against the schedule of treatments recommended by GHS (Frost & Sullivan, 2016). This has seen a significant boost in the use of Smartphones, especially in the rural parts of Ghana.

Another development that has triggered a significant upsurge in the Smartphone industry in Ghana is Telemedicine services. The populace in the rural regions of the country have embraced Telemedicine so that they do not have to commute to the major cities for consultations. To facilitate this, Telemedicine Point of Care Testing (POCT) was introduced as a novel implementation for the management and diagnosis of patients by video. Telemedicine services through Smartphones have bridged the distance between patients and healthcare providers with reduced costs but fast healthcare outcomes (Frost & Sullivan, 2016).

The financial sector has also seen significant improvement through the use of Smartphone applications. Before the Smartphone revolution in Ghana, traditional banks fought hard to extend basic banking services to customers outside major cities and towns mainly because of the cost involved in setting up physical presence in remote and rural parts of the country. However, with technological advancement, mobile operators have expanded to the remote parts of Ghana where top financial institutions have do not serve, by the use of apps that are assessible from Smartphone devices. Cost effectively, Mobile money offers service providers the opportunity to deliver services more than the conventional banks, via apps that are familiar people that has embraced the digitisation of basic financial services.

### **1.5.2 Distribution Channels and Consumer Purchasing Preferences**

The Smartphone market has two major categories of buyers. Firstly, there are huge retail operators of Smartphone devices, for instance in the UK the Carphone Warehouse and Phones 4u, while Telefonica and Phone Flex are among the retailers in Ghana. The model of these retail operators is to source Smartphone devices from manufacturers directly and sell them to end-users or consumers. The second classification of buyers is mobile network operators such as Vodafone, the EE network (bought by BT in 2016, and comprising the former T-Mobile and Orange frequencies), Tesco Mobile, Three, Virgin Mobile and others, which operate outlets throughout the UK (Egan, 2017). This category is quite popular in Ghana, with Vodafone among the leading network operators such as MTN, Kasapa and Tigo.

According to a Marketline (2017) report, these major categories of buyers have a tendency to compete on price in a saturated market like the UK, which in effect drives down the profits of manufacturers. The positions of Smartphone retailers and Network Operators are risky because technological disruption puts pressure on suppliers to stock the latest innovative devices in order to meet consumer expectations.

It is important to highlight that leading Smartphone manufacturers such as Apple and Samsung have a substantial retail presence in some countries including the UK and Ghana, which to a large extent strengthens their bargaining power against retailers. Furthermore, the Internet has opened yet another growing distribution channel of online retailing that provides some independence to Smartphone manufacturers.

A Mintel (2017) report on consumer purchase preferences reveals that buying Smartphones outright is the preferred option in the UK. From this report it emerges that 44 per cent of consumers acquired their devices by making an outright or one-

off payment, compared to 39 per cent who opted to make regular payments for their devices, usually on contracts that included upgrade options. This is consistent with a report by Global Data (2017), which indicates that major mobile phone service providers have launched low-cost, SIM-only contracts that allow consumers to acquire their handsets outright rather than paying for them by instalments or on payment plans. Consumers find this more economical, especially for leading brands such as Apple and Samsung devices. Explanations for why buyers opted to make an outright payment could be attributed to diverse reasons ranging from personal financial circumstances and credit scores to the freedom to go for upgrades or new devices without restrictions at any time.

In respect of retailing Smartphone devices, the Mintel (2017) research indicated that mobile network providers in the UK are at an advantage when it comes to retailing Smartphones to end-users. It provided evidence that 45 per cent of Smartphone owners confirmed that their Smartphones were purchased from their network operators, and that a further 20 per cent of consumers said they bought theirs from a mobile specialist (which distributes operators' contracts). This obvious consumer choice of acquiring a Smartphone device from a network operator gives them competitive advantage over other specialist Smartphone retailers. It is not surprising, as a considerable number of consumers are unwilling or unable to pay huge sums of money upfront for the newest Smartphone, and the convenience of acquiring a handset in addition to network service is undoubtedly a massive driver of network operators' success in this competitive market.

Current network providers strategically double up as Smartphone suppliers, providing flexibility and convenience to existing customers in addition to the contracts re-

lated to acquiring a Smartphone. This is strategically significant as most Smartphone users who have intentions to upgrade believe that renewing a current contract with a network provider is usually an easier option.

Emphasis must be laid on the fact that the dominant acquisition model of Smartphones is currently surpassed by manufacturers and retailers with deals of annual upgrade packages and interest-free repayment plans (Intel, 2017).

### **1.5.3 Prevailing Cultural Differences and Impacts on Smartphone Purchases**

Smartphone users make decisions on which communication device to use, whether intentionally or not. The decision of the type of device being a better option for communication is to a large extent dependent on the person's values (Richardson and Smith, 2007; Kim et al., 2016). Convenience and user-friendliness of a particular information technology device as a medium of communication are key values, yet there is influence from the national consumer culture to trust in a particular communication medium or device (Schwartz, 1994; Richardson and Smith, 2007; Kim et al., 2016; Hallikainen and Laukkanen, 2017). The impact that culture has on people's choices and purchase intentions of Smartphones as communication channels is explored in the section, with specific consideration for two cultural dimensions of high-context and low-context cultures (Hall, 1989).

According to Brett, (2007) and Rivers and Lytle, (2007), culture offers the main features of identification for people of a social group, as it exhibits itself in shared traits, values and beliefs, forming the foundation for a set of rules and guidelines that ensure that members of a group are able to interact among themselves and interpret group behaviours (Brett and Okumura, 1998; Hofstede, 1985). Cultural differences may readily arise in today's global economy (Hallikainen and Laukkanen, 2017; Kim

et al., 2016), due to various cultures distinctively associated with different countries and nationalities.

Hall (1989) distinguished the important components of culture connected with nations or nationalities as low-context and high-context cultures. Low-context cultures lay emphasis on direct and explicit (mainly verbal) communication, especially done directly. Low-context cultures are normally opened to multiplicity and diversity, among the population, as well as mind-sets, whereas high-context cultures lay much emphasis on tradition and history and typically, change is less readily accepted and gentle.

People incline to giving importance to interpersonal relations and group dynamics rather than individual preferences in high-context cultured countries such as Ghana. Established social relationships, mutual decision-making and trust in members form the primary characteristics of high-context culture (Guffey and Loewy, 2014). During communication in high-context culture, people pay less attention to words than to intentions. Furthermore, within high-context culture people essentially take a common viewpoint, and mutual intelligibility becomes the spirit of communication between members in the group.

Conversely, members of low-context cultures including the UK are individualistic and goal-oriented and as such seem to give significance to direct, especially one-to-one communications or discussion compared to group-based interaction. This attribute makes people from low-context culture self-opinionated and upfront in their communications and dealings with others, whereas individuals from high-context culture are less keen on the precision of language (Hall, 1989; Guffey and Loewy, 2014).

In the context of the Smartphone as a choice for a medium of communication, consumer culture in both countries is explored to identify possible impact on their choice of media used to communicate. Both the UK and Ghana use similar information technology media to convey messages, but newer communication devices propelled by technology, particularly Smartphones, are increasingly accepted socially and often utilised among individuals from low-context countries, including the UK, compared to high-context countries such as for instance Ghana (Rice et al., 1998; Kim et al., 2016; Hallikainen and Laukkanen, 2017).

Rice et al. (1998) scrutinised the impact of culture on individuals' choice of media for communication, and found evidence that participants from high cultures favoured face-to-face interaction more than people from low cultures. Interactions in the context of people in a group are located within a social setting which influences communication contact (who communicates with whom) and communication content (what message is communicated)" (Sproull and Kiesler, 1986).

Drawing from Sproull and Kiesler (1986), a fundamental difference between mediated interaction and face-to-face interaction is the elimination of social context cues in the first (Ozuem et al., 2008). Hence, participants of low cultures benefits greatly than those of high cultures in using a technology-mediated medium such as Smartphones due to its function of bearing much contextual cues such as emails (Rice et al., 1998; Kim et al., 2016; Hallikainen and Laukkanen, 2017).

## **1.6 Research Context: Constructivist Grounded Theory**

The Constructivist approach to grounded theory was proffered by Charmaz (2006) as an alternative to the classic grounded theory (Glaser 1998) and Straussian grounded theory approaches (Strauss and Corbin, 1998; Corbin and Strauss, 2008).

Charmaz (2006) appeared to value the inductive creativity of the classic methodology, which also resonated with the current popularity of constructivism within social research. Viewed from an epistemological position, constructivism asserts that reality is constructed by individuals in the form of multiple, intangible mental constructions as they assign meaning to the world around them (Guba and Lincoln, 2011). These constructions are socially and experientially based in nature. Thus, meaning is not derived from idle objects, but instead is generated from individual interactions (Howell, 2013).

Constructivist grounded theory facilitates continuous interplay between the researcher and the participants, and the incorporation of multiple perspectives in writing the emerging theory (Graham and Thomas, 2008; Strauss and Corbin, 1998). The researcher and researched interact “so that the ‘findings’ are literally created as the investigation proceeds” (Graham and Thomas, 2008, p. 111). Constructivism is about observing and understanding behaviour from the participant’s point of view and learning about participants’ worlds. It involves learning about their interpretation of self in the context of given interactions, and learning about the dynamic properties of interaction. Consequently, constructivists critique the view that there exists an objective truth capable of being measured (Crotty, 1998). Therefore constructivism grounded theory accepts the relativism of multiple social realities and mutual creation of knowledge by the viewer, viewed through their own understanding (Charmaz, 2006). From this viewpoint, the current study carries out data analysis via a process of interaction between the researcher and participants to construct shared reality.

## **1.7 Research Methods**

The choice of data collection methods is influenced by the nature of research questions and objectives (Robson, 2002) and the methodological strategy. In line with the aims and objectives of this study, both primary and secondary data collection methods were deployed to build a substantive theory. Online survey and interviews were the main data collection methods used, since these are considered suitable for qualitative grounded theory modes of data collection which rely on understanding processes and behaviours that necessitate brand switching. Empirical data were collected from 74 Smartphone users from Ghana and the UK to examine switching behaviour among users. The purpose of collecting data across countries was to explore the similarities and differences in purchase patterns and opinions in different markets, as different conditions prevail in these countries.

A research method consists of a set of specific procedures, tools and techniques to gather and analyse data. A method is a practical application of doing research. Regardless of the philosophical stance or paradigm of enquiry adopted in a research project, it is possible to use a combination of research methods when collecting data (Howell, 2013). The methods of data collection vary along a continuum: quantitative methods at one end and qualitative methods for data collection at the other end.

Saunders et al. (2009) identify two main types of data that emerge in a research project. They are primary data collected for the specific purpose of the project, and secondary data which are collected for the research project from other sources. Primary data are gathered and assembled specifically for the research project at hand (Zikmund, 2003). However, the most common sources of data collection in qualitative research are interviews, observations, and review of documents (Creswell, 2017;



Locke et al., 2016). Howell (2013) indicates that data can be collected through a number of different methods, including online survey questionnaire and personal interviews, which were employed for this study.

### **1.7.1 Survey Questionnaires**

As observed by Jill and Roger (2003), questionnaires are a list of carefully structured questions, chosen with a view to eliciting reliable responses from a chosen sample. According to Saunders et al. (2009), a questionnaire is a term used for techniques of data collection in which participants are asked to answer a set of predetermined questions.

Two types of questionnaires exist: self-administered questionnaires which are administered electronically through the Internet or an intranet, posted to respondents or delivered by hand to each respondent and collected later; and interviewer-administered questionnaires, which are recorded on the basis of each respondent's answer (Saunders et al., 2009). The former was used in this research and primary data were sourced by the use of questionnaires administered via the Internet, with the use of Qualtrics software to reach respondents.

### **1.7.2 Interviews**

Interviews are defined as primary data collection techniques for gathering data in qualitative methodologies (Cooper and Schindler, 2006). According to Baker and Foy (2008), an interview involves a personal exchange of information between an interviewer and one or more interviewees, in which the interviewer seeks to obtain specific information on a topic with the co-operation of the interviewee(s). Thus an interview refers to any person-to-person interaction between two or more individuals with a specific purpose in mind. Interviews vary considerably in their structure from highly

formal (structured), in which the interviewer follows exactly a designed and worded questionnaire, to highly informal (unstructured), in which the interviewer introduces the topic of interest and lets the discussion develop naturally by asking the respondent to expand or clarify points made (Baker and Foy, 2008). Unstructured interviews are informal interviews that enable the researcher to explore an issue with more insight. This implies that interviewees are allowed to speak by using open questions and encouraging further clarity of interviewee statements. A third type, the semi-structured interview, is a combination of both closed and open-ended questions and falls between the two (Saunders et al., 2007; Baker and Foy, 2008). In semi-structured interviews, the researcher is allowed to vary the order and number of questions according to the flow of conversation and the specific organisational context encountered in relation to the research topic (Saunders et al., 2009).

The semi-structured interview was chosen for this study because this method allows participants to elaborate upon points where necessary. Semi-structured interviews encourage participants to freely bring up issues that they feel are relevant to the topic under discussion. This means that there is an opportunity to probe and understand meanings, attitudes, opinions and personal experiences. Interviews can also be used to follow up on certain participant responses to questionnaires for further investigation (Saunders et al., 2009).

## **1.8 Statement of the Research Scope**

Brand loyalty is the extent to which a consumer's behaviour depicts repeat purchases or has affirmative attitudinal disposition to a brand (Gremler and Brown, 1996 Dwivedi, 2015; Liu et al., 2012; O'Keeffe et al., 2016). Consistent with this view,

Leckie et al. (2016) point out that losing customers indicates setback for an organisation and threatens its market position.

Research into customer-brand identification based on identity theory (Stryker 1968) suggests that in addition to the array of typical utilitarian values, customer-company identification functions as a higher order and can thus be considered an unarticulated source of company-based value (Bhattacharya and Sen, 2003). Consumer research, from an identity point of view, has recognised for some time that people consume in many ways that are consistent with their sense of self (Levy, 1959; Sirgy, 1982; Da Siveira et al., 2013; Wang and Yieh, 2016). Academics agree that successful brands are designed to satisfy not only consumers' functional needs but also their symbolic needs (Kapferer, 1997; Farhana, 2014; Leckie et al., 2016; O'Keeffe et al., 2016)

Switching occurs when a customer is motivated to review available alternatives in a marketplace due to "a change in competitive activity in the marketplace" (Seiders and Tigert, 1997; Jung et al., 2017). Similarly, Hogan and Armstrong (2001) stated that brand switching entails substituting an incumbent product or service with an alternative with the aim of securing competitive advantage.

A theoretical framework has been developed representing CBI with a particular brand, and it has ascertained resistance to brand switching from an identity perspective. Based on the brand loyalty literature and identity theory, CBI is defined in this research as the extent to which a brand is incorporated into one's self-concept through the development of cognitive connection with the brand, valuing this connection with the brand, and the emotional attachment to the brand (Lam et al., 2010). The CBI framework reflects the importance of identification, which shows the extent

to which consumers incorporate the brand into their self-concept in their quest for identity-fulfilling meaning in the marketplace of brands. Hence, the CBI framework is examined in the Smartphone industry, using data collected from Smartphone users from the UK and Ghana to provide empirical evidence for the effect of identity on switching behaviour and its unique role in building resistance to switching during market disruptions in a competitive market.

## **1.9 Conclusion**

This chapter has offered a description of the research focus, which also provided the rationale of the research along with the main aims and objectives. The research questions were then identified and an overview of the Smartphone market was provided. The chapter presented an overview of the methodology and methods used for carrying out the research. Finally, the last section of the chapter explained the statement of the research scope for this study. The next chapter provides conceptual clarifications of branding and also discusses key definitions to justify the need for the current investigation.

## **CHAPTER TWO**

### **LITERATURE REVIEW**

#### **2.1 Introduction**

The increasing importance of a brand in the marketplace is similarly matched by substantial increases in published literature on various aspects of the concept. This is reflected in the works of scholars such as Aaker (1991, 1996), de Chernatony (2001), de Chernatony and McDonald (1998), Kapferer (2001), Keller (1993, 1998), Murphy (1990, 1992), He et al. (2012), Da Silveira et al. (2013), Quinton (2013), Gilmore (2015), and Yeh et al. (2016).

This chapter is divided into three main sections. The first of these reviews the various aspects of branding literature deemed relevant for this study. The chapter discusses the origin and conceptual clarifications of brands. It sheds light on different perspectives of brands that are relevant to this study's exploration and it explores the benefits of brands to consumers and the consumer's relationship with brands. The chapter discusses brand loyalty literature and the gap in the literature which forms the foundations for this study.

The next part of the chapter examines two competing perspectives on switching behaviour. Brand switching is revealed to be based on functional utility maximisation and is also discussed as a form of social mobility. It is established that switching occurs when a customer is motivated to review their available alternatives in the marketplace due to a change in competitive activities in the market (Seiders and Tigerts, 1997; Jung et al., 2017).

Finally, this chapter considers the implications of identity theory for brands, and therefore the impact of brands on consumer identities. It also discusses the possible impact of consumer identities on brands, along with the associated managerial implications.

## **2.2 Conceptual Clarification of Brands**

Brands and the ideas behind them have evolved over many years. The word brand originated from the Old Norse word 'brandr' meaning, to burn, typically as brands were meant to, and still are, used by livestock farmers as signs to identify their animals.

Mollerop (1997) insists that these initial brand-like marks, existing long before industrialisation and the emergence of distinct commercial brands, included monograms, earmarks, ceramic marks, hallmarks, watermarks and furniture marks. He suggests that some of these marks have been traced to ancient Greece and Rome, while others like hallmarks and stonemasons' marks date from the fourteenth century. This view is shared by Murphy (1992), who also traced the origin of brands to the early guild of tradesmen, as did Mellerop (1997). He further elaborated that artisans signed their work with a mark or with symbols that were clearly identifiable. Some used a guild as a mark of authentication.

Branding has evolved from marking property and ownership, and identifying the origin and content of goods, to connoting different types of values, meanings and reputations (Quinton, 2013; Gilmore, 2015). Davies and Ward (2005) posit that there is little that remains unbranded in some respect, and even those that seek to create goods devoid of the obvious visual trappings of "brand" do so by constructing a specific and clear set of values around their products. Hence they insist that branding

has become one of the most important aspects of business practice regardless of sector or product. Branding is also increasingly used as a marketing strategy for non-commercial organisations such as political parties, sports organisations, charities and celebrities (Moor, 2007; Pich and Dean, 2015).

### **2.3 The Concept of Brand**

Gardner and Levy (1955, p. 35) have conceptualised brand in their early work as *“the complex symbols representing a variety of ideas and attributes that surround a product.”*

These ideas include subjective perceptions based on imagery, symbolism, reputation and other extrinsic attributes. These ideas are said to embody and communicate many things about a brand to consumers. Such attributes are held together by a particular brand name. Such brand names may also communicate unique functional attributes, subjective virtues surrounding the brand and other information that consumers may have accumulated over a period of time. These accumulated ideas are said to influence consumer perception of brands and the reality of what brands mean to them (Arnold, 1992; Hsu and Liou, 2017).

Gardner and Levy (1956) and Levy (1959) expressed the more profound view that the consumer realities which influence and stimulate individual purchase decisions are mainly based on individual subjective ideas of brand and perceived realities, rather than objective realities or specific products or services. Such perceived reality is not based on the functional attributes of a brand alone. Indeed, brand attributes are selected based on a consideration of their utilitarian functions (see for example, Carpenter et al., 1997) and this is beyond the ‘technical’ skills of consumers. Rather, everything people associate with a brand, intrinsic and extrinsic, contributes to what

consumers purchase. In the same vein, Penrose (1995) referred to a package of psychological promises bundled with a product or service on offer to the consumer.

King (1973) gave a more in-depth analysis of brands as the epitome of the marketing process. He further explained that a product or service is what a firm manufactures or offers, whilst a brand is what the consumer buys and what makes the company succeed. While the product is the intrinsic element of the brand, it represents the basic element in a whole article to which the consumer attaches value. This subjective belief held by customers represents the essence at the heart of brand.

This is exemplified in terms of the “psychological values” brought to bear on enhancing the functional benefit of a brand beyond its utility capacity (Levy, 1997; Sweeney and Soutar, 2001; Hsu and Liou, 2017). Such psychological value is embodied in the complex variety of ‘soft’ attributes and other associations that determine the desirability of purchasing a particular brand instead of its alternatives. These subjective attributes embody the values over and above the basic product that a brand provides to consumers.

Brands are sometimes seen in terms of their identities and brand names along with their long-term communication elements. They are also regarded as “added value” that can enhance the intrinsic value of products (Farquhar, 1989; Farhana, 2014; Leckie et al., 2016). De Chernatony and McDonald (1992) opined that the added value that a brand provides differentiates it from a commodity. In the same vein, Doyle (1994) defines a brand as a successful integration of an effective product, distinctive Identity and added value. The definition of brand as added value has its origin in economics where added value refers to the difference between the cost of an offering and the actual price it can attract in sales.



In a marketing context, it refers to subjective attributes such as those built around names, symbols, colours, slogans, tag lines and other devices created to link a product to the market. For instance, in the definition of brand offered by the American Marketing Association (AMA), the professional body of marketers in the United States of America, Kotler and Armstrong defined brand as “a name, term, sign, symbol, design or a combination of these, which is used to identify the goods and services of one seller or group of sellers and to differentiate them from those of competitors” (Kotler and Armstrong, 1994, p. 285).

The above definition resonates with the historical role of branding as an identification of ownership (Murphy and Hart, 1998; Quinton, 2013; Mitchell et al., Gilmore, 2015). What seems implicit in the ownership is that it fits very well with production-era marketing for which the above definition is perfectly suited. It also provides a simple definition that aggregates the various elements that make up a branded item. However, imperatively, there is the need to further research what brand means, especially as the basis for developing repeated value for the consumer.

Murphy (1992) used Gestalt theory to explain the complex nature of the brand. According to Murphy, while a brand is made up of different constituents of both tangible and intangible elements, it is not simply the sum of its individual parts that makes it distinct. Therefore, “any attempt to analyse the whole by breaking it down to its molecular components” (Murphy, 1992, p. 2) will not adequately capture the concept. A brand therefore acts as a gestalt in that it is a concept that is more than the sum of its parts; parts that may have developed out of numerous scraps of information that it has established in the minds of consumers.

For a brand to establish a different pattern of beliefs and values that consumers internalise as a gestalt (Solomon, 2002), it needs to offer credible, coherent and attractive value propositions over time. To Murphy, a brand represents a relational pact that is effectively a “pact between the owner and consumer to shop with confidence in an increasingly complex world, and it provides the owner with higher volume, often higher margins and greater certainty as to future demand” (Murphy, 1992, p. 3).

In keeping with the notion that a brand embodies many parts, (Keller, 1998; O’Keeffe, et al, 2016) defines the brand as a product, then, but one that adds other dimensions to differentiate it in some way from other products designed to satisfy the same needs. In terms of the gestalt analogy made by Murphy (1992), one can argue that these differentiation and satisfaction dimensions are also part of what makes a brand. However, this does not explain the whole concept, because the uniqueness of physical composition (product) and presentation are not sufficient to offer as a strong concept of brand.

Brands tend to create uniqueness through perceptions in the mind of the consumer, and that there is no other brand quite like a successful brand (Keller, 1998; O’Keeffe et al., 2016; Quinton, 2013). If the differentiation of a physical product does not represent the whole brand, what explanations can one have for the concept of brand? Brand has been rightly defined as a product or service that a particular firm is offering to customers in the market place which is differentiated by its name, presentation and the uniqueness of its compositions. However, it is erroneous to assume that is sufficient alone to explain the essence of a brand.

With increasing technological and manufacturing sophistication, many brands competing in the same product category can be produced to a virtually identical specifi-

cation. Furthermore, they can be produced at exactly the same cost. This in turn can create parity among brands in the same product category. With the possibility of such conditions, one cannot assume that uniqueness of composition and presentation makes a brand. This by itself suggests that there are many other factors that come together to explain a brand.

The multifaceted explanation of what a brand connotes is also apparent in practice. Indeed, empirical research on the concept of brand has reported the multifaceted meaning of the concept to many people involved with it. For instance, empirical research by de Chernatony and McWilliam (1990), de Chernatony and Dall'Olmo Riley (1998) found that in practice, managers variously viewed and typified a brand on the basis of its corresponding role within the individual functional department to which their professional orientation exposed them. They identified twelve representations of brands as: i) a logo; ii) a legal instrument; iii) a company; iv) a shorthand; v) a risk reducer; vi) a relationship; vii) an image in consumers' minds; viii) a value system; ix) a personality; x) an identity system ; xi) adding value, and xii) an evolving entity. Regardless of these numerous manifestations, consumers are always prepared to "impart to the brand as authority and unity, a cohesion, which functions as a gestalt prompting recognition, confidence and easy familiarity" (Murphy, 1990, p. 3).

Following from the above discussion, conclusion may be drawn that most consumers are familiar with a particular brand is as they readily generate what that brand looks like. However, an objective definition remains elusive. No single definition can satisfactorily explain the concept of brand, which reflects the complex nature inherent in attempts to define concept of brand. Brand in reality may mean different things to

many people according to Kapferer (2001, p.3) who perceived that the inability to find a single definition explains further that:

*“It is as if any definition that came to mind would not be complete. Some people talk about the name by which a product is known, others about added value, image, expectation, values, still others about the differentiating mark of the product and consumer badge. In fact they are all right in their own way; a brand is all of these things simultaneously.”*

In light of the complexity of this discussion, one could agree with Kapferer that the reality of the modern brand makes it impossible to assert that a singular definition can capture all types of brands in their guises. One may not be able to reduce all of a brand's parts to only one encompassing definition. Building on the issues discussed above, a specific definition of brand is offered to reflect the particular approach of the research reported in this study. Hence, a brand is defined in terms of its perceptual, intangible elements, as much as its tangible aspects. This thesis takes orientation from Murphy's (1990, p. 4) definition of brand as:

*“a blend of attributes, both tangible and intangible, which are relevant and appealing, and which meaningfully and appropriately distinguish one brand's uniqueness from another”.*

In light of the above discussion, there is no singular acceptable conceptual definition of a brand. It is worth noting that this definitional problem is not peculiar to brand. Conclusions could be drawn to the effect that definitions adopted by researchers, particularly in the social sciences, are generally more often than not controversial in nature (Kerlinger and Lee, 2000; Perry, 2000). Therefore, an examination of the meaning of brand in this thesis will be based upon its ability to be many things to many people. However, for the purposes of the current study, a brand must convey authority, cohesion and confidence and it must prompt recognition in the mind of the consumer.

Following de Chernatony and Dall'Olmo Riley's (1998) work, this thesis discusses the concept of brand in terms of four distinctive themes, which are: i) the brand as a conveyor of information to the consumer; ii) the brand as a symbol; iii) brand as relationship; and iv) brand as a risk reducer.

### **2.3.1 Brand as Shorthand: A Conveyor of Information and Meanings**

In a market where consumers are offered a myriad of competing brands and an equal number of substitutes, making a simple choice can be a time-consuming chore. Furthermore, competing brands also make functional and perceptual claims about the uniqueness of their offerings. These sometimes make brand purchase decisions difficult for the consumer. Brand serves as a simple way of making sense of numerous functional and non-functional benefits on offer in such a complex situation (Carpenter et al., 1997; Leckie et al., 2016; Kumar and Shah, 2004; Ozuem et al., 2016; Giovanisa and Athanasopouloub, 2018). Brand, therefore, simplifies the process of a purchase decision. It acts as shorthand for recalling various mental impressions of both functional and non-functional characteristics that a brand has accumulated over time. These mental impressions are created by previous exposure to the brand and by perceptual stimuli.

The exposure of the consumer to sensory stimuli influences their perceptions of a brand. Perception is the process by which various external stimuli surrounding a brand are selected, organised and interpreted. Consumers are then able to relate further new information to the image that is already in their memory, based on fundamental organisational principles.

The previous exposure of consumers to a brand may include prior usage, trial purchases, friends and family recommendations and 'grapevine' information. This infor-

mation informs their interpretations of everything they know about a brand and their attitude towards such a brand. Deliberate brand support information also abounds in numerous media through both advertising and other forms of brand communication such as those placed in the topical features section of newspapers, magazines and trade journals (Stevens, 1981; Schultz, 1998) as a means of generating credence support. The credence with which consumers endow a brand may then inform their attitude towards a brand and this can be stored as data in the memory for future retrieval when necessary (Dwivedi, 2015; Liu et al., 2012).

In addition, brands have personal and social meanings. As the social meaning of brands becomes more important than their functional usage, the experiences that consumers have with brands become more mediated rather than being formed based on the direct effect of the functional meaning of the brand. This implies that brand is understood to mean not only what it is functionally used for, but also some other ideas or feelings as its symbolic nature becomes more important than its functional impact (Levy, 1959, 1999; Leckie et al., 2016; Ozuem et al., 2016; Giovanisa and Athanasopouloub, 2018). A symbol is something (a word, an image or an object) that stands for or signifies something else (Peter et al., 1999). A brand therefore is also a symbol.

The symbolic nature of a brand is more apparent as the consumer uses the purchase of a brand to enhance their sense of self. Consumers are also increasingly making non-purchases of brands a significant gesture for expressing their belief about issues. For instance, the boycotting of brands such as Nike and Gap by anti-globalisation campaigners represents an attempt to symbolically express beliefs about the appropriateness of the global intention of these brands and their manufac-

turing process. This implies that consumers are “able to gauge grossly and subtly the symbolic language of brands and then translate them into meanings themselves” (Levy, 1999, p. 207).

Consumers draw the meanings they associate with brands from several sources of association. The specific stimulus of celebrity endorsers such as Michael Jordan for Nike and various Hollywood makeup artists for Revlon are well known sources of brand communication. Other extrinsic cues such as packaging, colours, smells and shapes represent important sources of marketing stimuli about brands that consumers store in their memory.

Marketing mixes, such as elaborately staged television commercials and price and product design, represent another source of symbolism. Deliberate media communications such as product placement, journalists’ and opinion leaders’ comments are other sources of ideas and knowledge about brands. When making sense of a marketing stimulus, consumers interpret the meaning of these stimuli in relation to previous associations from various sources that are linked with these images. These associations influence the meaning derived from marketing stimuli and the inferences drawn from them. Solomon (2001) observed that the meaning that consumers derive from this process is influenced by their perception of signs which are related to brands through either conventional or agreed upon associations. One can therefore say that symbolic meanings represent the psychological and social meanings of brands for consumers. Consequently, the non-functional meaning of a brand becomes more relevant than its physical attributes or its functional consequences. A brand is more symbolic in nature and its essence depends on its psychological and social value more than its functional attributes (Carpenter et al., 1997; Leckie et al.,

2016; Kumar and Shah, 2004; Ozuem et al., 2016; Giovanisa and Athanasopouloub, 2018). However, its symbolic aspects cannot be said to represent the whole brand, because there can never be a brand without a product, service, process or experience that serves as the core concept around which psychological and social meanings are associated, and from which symbolic interpretations are derived.

It can therefore be concluded that defining a brand solely in terms of symbolic meaning is too artificial. Moreover, total reliance on a brand's functional meaning will be too mechanical in orientation. The functional side of a brand represents the object to which a specific sign is attached. Both object and sign inform meaningful consumer interpretations of a brand. Thus, symbols constitute an important facet of brand meaning upon which consumer purchase decisions are based.

### **2.3.2 Brand as a Relationship**

As mentioned above, the nature of the associations that consumers hold about brands is generally derived from the meanings that each brand creates or evokes in their minds. For instance, stronger brands may consistently evoke a rich array of favourable meanings and associations (Biel, 1993; Batra et al., 1996, He et al., 2012; Leckie et al., 2016; Giovanisa and Athanasopouloub, 2018). These associations can be built around rational aspects (aspects dealing with the functional attributes of a brand such as durability, speed, safety and price). A brand's association could also be developed to appeal to emotional elements, thus evoking a psychological association (Riezebos, 1994). Each of these may in turn contribute to different perceptions and consumer memories associated with the brand. The rational information and cognitive sense may help in brand risk assessment, but the emotional element may trigger the affective parts of the memory.



De Chernatony and Dall'Olmo Riley (1998) elaborate on these ideas and suggest that a brand is sometimes defined from this perspective as a relationship (Aaker, 1996; Ambler, 1992, 1996; Plummer, 1985; He et al., 2012; O'Keeffe et al., 2016) in which all the feelings, imagery, thoughts, usage, memory, colours and smells form the basis upon which the consumer mentally thinks of the brand as a person. The characteristics that evoke a brand in the minds of consumers are then used to define brand personality, and form the basis upon which they think of a brand. These determine how they relate to the brand (Aaker, 1994; He et al., 2012; Yeh et al., 2016). For instance, certain brands are associated with users who choose to portray themselves with the specific connotations and personality that a brand conveys, which sometimes provides an avenue for self-expression.

Batra et al. (1996), consistent with He et al. (2012), hold the view that the compatibility between consumer and brand in such a relationship depends on how they characterise each other. Findings from empirical research on symbolism also provide evidence that in the arena of brand perception consumers often transfer this type of personality assessment to brands (Aaker, 1997; Osselaer and Alba, 2000; Kumar and Shah, 2004; Ozuem et al., 2016; Giovanisa and Athanasopouloub, 2018).

### **2.3.3 Brand as Risk Reducer**

Perhaps the most important factor a buyer faces in many buying circumstances is risk reduction. The amount of risk that consumers are exposed to also differs from one market to the other. For instance, the level of risk in the fast-moving consumer goods market may be less life-threatening than flying in a malfunctioning aeroplane. Yet this difference in consequences may not reduce the sense of mistrust that a consumer has about a particular item. Bowbrick, 1992 and Jung et al., 2017 shared

the opinion that risk is composed of two elements that are very significant for the consumer's consideration. These are the chances of a product's inability to perform as expected, and the effect of such non-performance on them. Consumers are therefore sensitive to any potential risk they may be exposed to in buying process (Zhao et al., 2010). Brands help consumers to reduce the level of risk they are exposed to when purchasing an unknown commodity. Of course, this does not completely eliminate risk that sometimes occurs during the production and distribution processes.

The point, then, is that in making a purchase, the buyer relies on the brand to guard against the risk of making the wrong choice at an appropriate cost. The risk of the latter is not defined in terms of monetary value alone. It also includes the time and search efforts put into selection, as well as the level of risk that may be encountered due to the usage of an unwanted brand. This may include physical risks such as monetary loss, health and personal injury. Such risks may be emotional or psychological in nature such as damaging one's personal standing among friends and family, and loss or damage to an item of sentimental value. With increasing functional parity, and the sheer proliferation of brands, consumers find it easier to interpret the benefits which a familiar brand offers them. There is increased confidence in the purchase intention by consumers (Batra, 1996; Jung et al., 2017).

Marketing strategies for risk reduction such as guarantees or warranties also serve as perceptual risk reducers even in the absence of any objective changes to the brand. Consumers may resort to buying the same brand repeatedly, thereby expressing their confidence in the purchase decision (Aaker, 1991; Riezebos, 1994; Dwivedi, 2015; Liu et al, 2012; Jung et al., 2017).

## **2.4 Benefits of Brands**

Brand associations are based on the functions or benefits that the consumer associates with the brand. Brand associations may be distinguished by how much information is summarised in the association. Associations may be classified into three categories: attributes, benefits and attitudes (Keller, 1993; Del Rio et al., 2001; Bharadwaj et al., 2011; Moon and Sprott, 2016). A major distinction is often made between the categories of benefits provided by a brand. Brands possess functional, symbolic and experiential meaning and a single brand may offer a mixture of benefits. (Park et al., 1986; Keller, 1993; Bharadwaj et al., 2011; Moon and Sprott, 2016). Some researchers suggest that a distinction lies between functional, symbolic and experiential beliefs, thus evoking differing behaviours such as purchase intentions by consumers according to belief categories (Orth and De Marchi, 2007; Park et al., 1986; Park et al., 2013).

A functional concept is a firm-derived brand meaning which is designed to solve consumption needs generated outside the organisation. A symbolic concept, on the other hand, is designed in such a way as to provide the consumer with associations to a particular group, role or self-image. An experiential concept is internally generated and sates appetite for stimulation and variety (Park et al., 2013). Expanding on the earlier work of Park et al. (1986), Keller (1993) specifies functional benefits are those that provide a solution to a specific and practical problem. Symbolic benefits on the other hand fulfil needs generated internally, such as self-enhancement. They allow the consumer to signal to others their self-image or their association with a desired group or role.

Experiential benefits are those providing “sensory pleasure and cognitive stimulation” (Park et al., 2013; Richins, 1994). Benefits from brands may exist in a mixture of the forms described, providing all benefits at once. This idea is further supported by Bhat and Reddy’s (1998) empirical work, which suggests that a brand’s value to consumers may be concurrently symbolic and functional. When brands meet the functional, symbolic and experiential needs of consumers, benefits are created which deliver value to the consumer. Sheth et al. (1991) propose that there is a wider range of different types of values, specifically, conditional value, social value, emotional value, functional value and epistemic value. Expectedly, functional value provides utilitarian benefits, social value provides symbolic benefits, and emotional value provides experiential benefits. In a similar manner, Del Rio et al. (2001) refer to the nature of brand utilities for the consumer. More specifically, the authors suggest that brand utilities may be classified based on two basic dimensions: their functional and symbolic values. The delimitation of what is understood as a functional or a symbolic utility is defined by the needs to be satisfied by the brand. The significance of brand associations for consumers is recognised in that they have an influence on consumer behaviour. Consumers have choice, an intention to purchase, a willingness to pay a price premium for the brand, and a preparedness to recommend the brand to others (Park and Srinivasan, 1994; Cobb-Walgreen et al., 1995; Aggarwal and Rao, 1996; Hutton, 1997; Yoo et al., 2000). In particular, consumers are more inclined to recommend a brand when they associate it with relevant emotional experiences (Westbrook, 1987).

#### **2.4.1 Functional Benefits of Brands**

The functional benefits of brands are often product-oriented and satisfy immediate and practical needs. Such benefits are often associated with solving or avoiding

problems (Keller, 1993; Ebrahim et al., 2016). Functional benefits, particularly those based on attributes linked directly to consumer decisions, are not without their limitations since they can fail to be differentiated and moreover are easily replicated (Aaker, 1996). Functional congruity in consumers is led by utilitarian motives, and expresses the extent to which the functional attributes of a brand match the expectations of the consumer in terms of how the product should perform to accomplish its main goal (Kressman et al., 2006). The greater the functional congruity, as perceived by the consumer, the more likely they are to identify with the brand.

Brand loyalty is also an outcome of the functional utility of a brand as derived by the consumer (Bhattacharya et al., 1995; Appiah, 2014; Ebrahim et al., 2016). The widely studied concept of utilitarian value is described as instrumental (i.e. functional, task-related) and primarily related to cognitive evaluation on the part of the consumer. Utilitarian value is linked with the notion of product performance and usefulness (Mano and Oliver, 1993). For example, savings, convenience and product quality are classified amongst utilitarian values or benefits (Chaudhuri and Holbrook, 2001; Ailawadi et al., 2001; Ebrahim et al., 2016).

#### **2.4.2 Symbolic Benefits of Brands**

Brands serve as symbolic resources which users may employ to construct social identities, to assign meaning to themselves and, further, to signal meaning to others (Elliott and Wattanasuwan, 1998; McCracken, 1988). The more 'symbolic' the brand, the more likely the brand is to enable the user to communicate their self-concept (Escalas and Bettman, 2005). The symbolic nature of brands, specifically the range of distinctive images they reflect (Chaplin and John, 2005) has meant that they are particularly useful as a means for satisfying the self-definitional needs of

consumers (Bhattacharya and Sen, 2003; Fournier, 1998). In some cases, consumers derive symbolic meaning from the association they make between the brand and the typical user of the brand (Muniz and O'Guinn, 2001 Kumar and Shah, 2004; Ozuem et al., 2016).

The symbolic benefits of brands allow consumers to construct their self-identity and to signal this to others. Individuals select brands that bear unique personalities and images, which they use to express a self-image or an idealised self-image which can serve a self-enhancing or self-consistency role (Aaker, 1997; Sirgy, 1982; He et al., 2012; Yeh et al., 2016). The idea of the signalling component of the brand resonates with Ligas and Cotte's (1999) holistic framework in which the process of brand meaning negotiation is explained using symbolic interactionism. The authors suggest consumers do not always necessarily act independently when interpreting marketer-induced brand meaning in the cultural system since social forces also exert their influence. It is within the social environment that the consumer most often attempts to signal his/her own intended meaning to others.

Earlier work from Belk (1988) suggests that consumers possess symbolic meanings of brands which they then use to "extend and bolster a consumer's self-concept". More specifically, by owning brands that they perceive to possess symbolic images which are congruent with certain elements of their own self-concept, consumers maintain or strengthen their self-concept (Dolich, 1969; Hollebeek et al., 2014). As an extension of this ownership, consumers are also able to express their own identities, in that the brands they choose project images similar to their own self-image (Aaker, 1999; Sirgy, 1982; Brodie et al., 2013). This view has been supported by

other researchers who suggest that symbolic benefits correspond with the need for social approval, self-expression and outer-directed self-esteem.

Consumers may value the exclusive nature of a brand because of the way in which it relates to their self-concept (Solomon, 1983; Orth and De Marchi, 2007; Da Siveira et al., 2013; Wang and Yieh, 2016). Self-congruity is driven by self-consistency motives such that the greater the similarity between the brand image or brand personality and the consumer's self-concept, the higher the self-congruity. Since self-consistency is a means of self-expression, the greater the self-congruity, the more likely consumers are to identify with the brand to uphold their self-consistency (Kressman et al., 2006; Da Siveira et al., 2013; Wang and Yieh, 2016). Symbolic needs are internally generated and are motivated by social meaning (Solomon, 1983). For example, self-enhancement, group membership and ego-identification are defined as symbolic needs (Park et al., 1986). A symbolic need helps the consumer to be defined as a member of a specific group (Hoyer and MacInnis, 1997; He et al., 2012).

The branding literature exploring the role of brands in consumers' lives reveals that brands can provide self-definitional benefits beyond utilitarian benefits (Aaker, 1999; Escalas and Bettman, 2005; Fournier, 1998; Keller, 1993; Keller and Lehmann, 2006; Farhana, 2014; Leckie et al., 2016). The idea of brands as a means for self-expression has come to the fore because brand consumption allows consumers to express their identities by choosing brands whose images are perceived to be similar to their own self-images (Aaker, 1999). Since consumers by nature seek to reaffirm their self-image, brands allow consumers to not only express their identities, but also to reaffirm their principles or beliefs (Kleine III et al., 1993; Levy, 1959; Solomon,

1983; Chernev et al., 2011). As implied earlier by Hoyer and MacInnis (1997), consumers may choose brands to allow them the particular association with other stereotypical brand users (Escalas and Bettman, 2003, 2005; He et al., 2012).

Consumer choices about brands may be used to send social signals to other consumers about themselves, as is particularly the case with luxury brands (Han et al., 2010). In some instances, consumers extract meaning from the brand by assessing its personality, such that the signalling effect may be based not only on a stereotypical user of the brand but also on the brand's personality (Lee, 2009). The symbolic values of brands extend deeper than their role as a signalling device in that they help consumers to retain a sense of the past, to categorise themselves in society, and to communicate cultural meanings such as social status and group identity (Belk, 1988). Consistent with this view, it is apparent that the symbolic consumption of brands enables consumers to communicate some of their cultural categories such as age, gender, social status and other cultural values such as family and tradition (McCracken, 1993).

In an attempt to explain the symbolic nature of the brand, Menneaghan (1995) suggests that the brand is separate from the product. The product performs the function and the brand is "grafted on by advertising". Since products are easy to replicate, the emergent symbolic meanings form a basis for the positioning and differentiation of brands. According to some researchers, consumer purchasing behaviour is influenced by the symbolic meaning of the brand in the form of shared values (Sirgy et al., 1997, 2000; He et al., 2012; Da Siveira et al., 2013; Wang and Yieh, 2016). According to Zhang and Bloemer (2008), consumer–brand value congruence describes the similarity between a consumer's own personal values and his or her perceptions



of the brand's values. Further, the authors provide empirical evidence for consumer–brand value congruence as having a significant and positive effect on satisfaction, trust, affective commitment and loyalty.

### **2.4.3 Experiential Benefits of Brands**

How consumers experience brands and the benefits derived from brand experience (experiential benefits) has gained much attention in marketing practice (Brakus et al., 2009). Consumers' 'experiences' occur when they search for products, shop for them and receive service, and when they consume them. When they go through this process they are exposed to the utilitarian benefits of the product. At the same time, they are also exposed to brand-related stimuli which prompt subjective, internal responses that constitute 'brand experience'. Such brand-related stimuli include design, logo, identity and packaging and the environment in which the products are sold. Brand experiences include particular sensations, feelings, cognitions and behaviours on the part of consumers which occur in response to particular brand-related stimuli. Such stimuli are the source of "subjective, internal consumer responses" such as sensations, feelings and cognitions which are referred to collectively as the "brand experience" (Brakus, et al., 2009). Brand experience is not necessarily motivationally based. Indeed, experiences occur even when the consumer has no particular connection to the brand.

Research on experiential consumption highlights the important role of particular experiential needs in consumption. Adopting a hedonic perspective to consumption, Hirschman and Holbrook (1982) suggest that products evoke an emotive response amongst consumers. A brand designed with an experiential concept seeks to fulfil the needs of stimulation and/or variety on the part of the consumer. Empirical work

conducted by Brakus et al. (2009) suggests four dimensions of brand experience: sensory, affective (including emotional and social relationships and belonging), behavioural and intellectual. In other words, brands variously evoke four types of experiences. The authors also demonstrated how brand experience directly affects consumer satisfaction and loyalty, and such a relationship is indirectly mediated by brand personality. Consumer experiences with the brand are more than the fulfilment of their functional needs (Underwood et al., 2001). However, brand experiences provide the consumer with value in a similar way to utilitarian benefits (Brakus et al., 2008).

Experiential needs are internally generated and include the need for pleasure and cognitive stimulation (Park et al., 1986; Da Siveira et al., 2013; Wang and Yieh, 2016). Holbrook and Hirschman (1982) have similarly suggested that fun and enjoyment are amongst the experiential benefits of consumption. Brand experiences may be short-lived or long-lived and it is those that are long-lasting which consumers store in their memories. These ultimately impact upon customer satisfaction and loyalty (Oliver, 1980; Reicheld, 1996). Since the experiential nature of the brand evokes feelings in consumers, different types of feelings emerge. Keller (2001) described brand feelings as emotional responses and reactions with respect to the brand, identifying six significant types of brand-building feelings as follows:

- ***Warmth:*** *The degree at which the brand brings calmness and peacefulness to consumers. Consumers therefore may feel sentimental or affectionate towards the brand.*
- ***Fun:*** *Feelings of fun are upbeat. Consumers may feel amused, joyful and cheerful.*

- **Excitement:** *Excitement relates to the extent to which the brand makes consumers feel that they are energised and are experiencing something special. Brands which evoke the feeling of excitement may result in a feeling of elation or the described feeling of “being alive”.*
- **Security:** *Feelings of security occur when the brand induces the feeling of safety, comfort and self-assurance in the customer.*
- **Social Approval:** *Feelings of social approval takes place as a result of consumers positively feeling about how others perceive them.*
- **Self-Respect:** *Self-respect transpires when consumers feel better about themselves using the brand and resulting in a sense of pride, accomplishment or fulfilment.*

‘Brand experience’ is also used in the inference of the brand personality. The consumer draws upon his/her specific experience to extract information to form a judgment about the brand’s personality (Brakus et al., 2009; He et al., 2012; Da Siveira et al., 2013; Wang and Yieh, 2016). Brand experience is also key to the self-brand connection process, since consumers use their experiences with the brand to infer meaning. The impact of a brand is dependent upon the quality of consumers’ experiences with that brand and the extent to which such experiences create vivid linkages in the mind of the consumer (Fournier, 1998). Some consumers form meaningful and personal connections between themselves and a brand to the extent that the brand is closely associated with the individual’s self-concept (Escalas and Bettman, 2003; He et al., 2012; Da Siveira et al., 2013; Wang and Yieh, 2016).

For consumers, meaning associated with the brand may be derived from the image or “personality” of the brand that develops with time from advertising and the “dynamics of popular culture in society” (Keller, 2008; Da Siveira, 2013). These are also

derived from the individual's own personal experiences with the brand (Escalas, 2004). The underlying notion of the self-brand connection construct is that when brand associations (meanings) are used to construct one's self or to communicate one's self to others, a strong connection is formed between the brand and the consumer's self-identity (Escalas, 2004; He et al., 2012; Stokburger-Sauer, 2016).

#### **2.4.4 Emotional Connections**

Experiential benefits create emotional benefits which enable emotional brand connections in consumers. According to Aaker (2009), "it makes sense for marketers to consider emotional, self-expressive and social benefits" as a source of value. The author describes emotional benefits as "the ability of the brand to make the buyer or user of a brand feel something during the purchase process or user experience". Thomson et al. (2005) and Park et al. (2010) emphasise the role of emotional reactions to the brand in forming consumer-brand connections.

On a similar note, brand affect is defined as "a brand's potential to elicit a positive emotional response in the average consumer as a result of its use" (Sung and Kim, 2010). Customers are known to form affect-laden (emotion-based) relationships with brands that match their personality. These provide a means to self-expression, self-definition and self-enhancement. Brand value is subsequently co-created through the affective relationships that customers form with brands, and this may be determined through both direct (i.e. usage or consumption) or indirect (i.e. pure perception) contact with the brand (Merz et al., 2009). Brands are created through a combination of rational and emotional constituents, the emotions evoked by brands enhances the buying and consumption processes (Hirschman and Holbrook, 1982; Da Siveira et al, 2013; Wang and Yieh, 2016).

Research suggests that consumers can become emotionally attached to consumption objects such as brands and these subsequently predict their commitment to the brand (brand loyalty), and their willingness to pay a price premium for it (Thomson et al., 2005). Such attachment reflects an emotional bond with the brand (Shimp and Madden, 1988; He et al., 2012). Researchers and practitioners have recognised the importance of creating emotional connections between consumers and brands. Berry (2000) suggests that any great brand makes an emotional connection with the intended audience. He further argues that such a brand reaches beyond the purely rational and purely economic level to spark feelings of closeness, affection and trust, since consumers live in an emotional world and their emotions influence their decisions. For consumers, advertising often connects brands to the emotional benefits associated with product use. Emotional benefit information is thought to provide data about affect-based experiences such as excitement and joy associated with the brand (Ruth, 2001). A key driver in emotional brand attachment is the concept of self-congruence, which is explained as the parity between the consumer's self and the brand's image or personality (Aaker, 1999; Sirgy, 1982; Malär et al., 2011; Da Siveira et al., 2013; He et al., 2012; Wang and Yieh, 2016). The consumer's self-concept is involved in emotional brand attachment (Chapin and John, 2005; Park et al., 2010). Consumers purchase brands with a specific personality to use in the expression of their self-concept (Aaker, 1999; Belk, 1988; Stokburger-Sauer, 2012; Da Siveira et al., 2013; Wang and Yieh, 2016). The self-congruity literature is reviewed in depth later on in this chapter.

## **2.5 The Symbolic Nature of Brands and Brand Personality**

Two streams of literature are applied to understand the symbolic benefits of brands: self-congruity and brand personality research (Aaker, 1997; Sirgy et al., 1991 Da

Siveira et al., 2013; Wang and Yieh, 2016). Self-congruity explains how much a consumer's self-concept has parity with the personality of a typical user of the brand. Brand personality connotes the collection of human features related to a brand (Aaker, 1997). Consumers tend towards those brands with similar personality traits to themselves. Noteworthy is the symbolic interactionist perspective study of brand personality which proffers that brand personality is negotiated not only in the social environment but also within the individual environment.

The unique personality dimensions of the brand tailors its intended meaning beyond the aggregate perspective to an individual level (Aaker, 1997; Ligas and Cotte, 1999; Da Siveira et al., 2013; Wang and Yieh, 2016). For consumers, the symbolism and meanings which constitute brand personality are not necessarily inherent in brands but are usually intentionally and sometimes unintentionally included with corporate communications and customer reactions (Wee, 2004). A traditional view of brand personality is that its traits become associated with a brand via the people who represent it; for example, a typical user of the brand, the company's employees or CEO and the endorsers of the brand (McCracken, 1989). Batra et al. (1993), on the other hand, suggest that a brand's personality is indirectly created over time by the entire marketing mix. The personality of the brand may be considered a non-functional benefit (Plummer, 1984) and is of importance in building competitive advantage and brand loyalty amongst consumers (Plummer, 1984; Aaker, 1996, 1997; Yeh et al., 2016). Why and how brand personalities affect consumer brand loyalty is explained by Kim et al. (2001). Their study suggests that it is the self-expressive value and distinctiveness of the brand that influences the attractiveness of the brand's personality and thus loyalty towards the brand. Aaker et al. (2004) emphasise the determinant role of brand personality in establishing consumer-brand relationships. Brand per-

sonality enables a consumer to articulate his/her self (Belk, 1988), whether an ideal self or exact aspects of the self (Kleine III et al., 1993; He et al., 2012; O’Keeffe et al., 2016). It is thus an important determinant of consumer preference and usage (Biel, 1992).

Later research supports this idea by articulating that consumers incline towards brands with particularly salient personality characteristics that enable them to highlight their own personalities, in particular situational contexts (Aaker, 1999; Helgeson and Supphellen, 2004). In other words, buyers strongly aspire to develop relationships with their preferred brands which projects a personality that they are comfortable with, in the same way as interacting with someone they like (Aaker, 1996; Phau and Lau, 2001). To enhance their connections with brands, consumers view brands anthropomorphically and assign various characteristics and personalities to specific brands. They therefore form connections between certain brands and their own identities (Escalas and Bettman, 2003). Once products and brands are associated with ‘human’ qualities, people may interact with them in ways that parallel social relationships and their interactions are guided by the norms that govern these relationships (Aggarwal, 2004). This mechanism further reinforces the consumers’ self-concept through self-worth and self-esteem enhancement (Aron et al., 1995; He et al., 2012; O’Keeffe et al., 2016).

The concept of brand personality is considered to be a subset of brand image and thus the two constructs are very closely associated (Aaker, 1996; Biel, 1992; Keller, 1993). The expression of personality is a major dimension expressive of the image of symbolic brands (Bhat and Reddy, 1998; Keller, 1993). Not only do people use objects and brands to remind themselves of who they are, but they also often imbue

brands with human characteristics that define distinct brand personalities (Aaker, 1997; He et al., 2012; O’Keeffe et al., 2016), leading to the formation of relationships with brands that reinforce self-concept through mechanisms of self-worth and self-esteem (Fournier, 1998; Yeh et al., 2016). Krohmer et al. (2007) suggest that a match between a consumer’s personality and the brand personality has important brand performance implications in that consumers are more likely to positively evaluate a brand which they perceive to have similar personality characteristics to themselves. It appears, therefore, that self-congruence affects brand performance. Since brand personality specifies personality traits, this may have more influence on consumers than brand image which focuses more closely on the functional attributes and benefits of the brand.

## **2.6 The Symbolic Nature of Brands and Self-Congruity**

Individuals are driven by a need to feel good about themselves and to try to maintain as well as enhance their own self-esteem (Malär et al., 2011). One way towards achieving this is to consume brands that are congruent with one’s own view of self or ideal self (Sirgy, 1982). Indeed, brands may be viewed as a system of signs in construction of the self (Schembri et al., 2010). Consumers evaluate the symbolism of the brand and determine whether it is appropriate for their ‘selves’ (Ahuvia, 2005; Belk, 1988; Schouten, 1991). According to Levy (1959) the sign is appropriate for a consumer if it reinforces or enhances the self. Self-congruity, according to Helgeson and Supphellen (2004), is viewed as “how much a consumer’s self-concept matches the personality of a typical user of the brand”.

Self-congruity refers to the extent to which a consumer compares the image of him/herself and the image of the brand. That is defined in accordance with a stereo-



typical user of the brand, which influences consumer behaviour. The concept of 'self' is of great importance to individuals and by nature individuals' behaviour reflects the desire to both protect and at the same time enhance their self-concept (Kleine et al., 1993; Sirgy, 1982; Underwood, 2003). Aaker (1999) later proposed that self-concept encompasses all aspects of self, including readily accessible or "schematic traits and those that are not necessarily schematic". Schematic traits are those that are very descriptive of and important to an individual. The need to express a self-schema stems from the need for consistency and positivity, which in turn improve self-esteem and help self-presentation (Aaker, 1999). By owning brands which they perceive to possess symbolic images that are congruent with certain elements of their own self-concept, consumers maintain or strengthen their self-concept (Dolich, 1969). As an extension of this ownership, consumers are also able to express their own identities in that the brands they choose bear images similar to their own self-image (Aaker, 1999; Sirgy, 1982). Consistent with this view, such ownership leads to strong relationships with those brands that have values and personality associations that are congruent with their self-concept (Sirgy, 1982). The subsequent brand relationships can therefore be viewed as expressions of consumers' identities (Swaminathan et al., 2007). Consumers psychologically compare their self-images with those of the stereotypical user of a brand. The psychological comparison involving the interaction between the product-user image and consumer's self-concept creates a subjective experience called self-image congruence and this is considered an important predictor of consumer behaviour.

According to Sirgy et al. (1997), brands also possess "personal image attributes" which themselves are reflective of the stereotypical user of the brand, e.g. young, hip or cool. Consumers draw not only on the perceived stereotypical user of the brand to

form congruity judgments, but also on the brand personality itself. The greater the congruence between brand personality and self-concept, the more likely the consumer is to exhibit a favourable attitude towards the brand (Kuenzel and Halliday, 2010). It is widely held that self-congruity explains consumer preferences in respect of the fact that they seek products and brands that have higher self-congruity than lower self-congruity (Helgeson and Supphellen, 2004; Kettle and Hauble, 2011; Da Silveira et al., 2013). According to Puzakova et al. (2009), self-concept/brand image congruity is described as the level of congruity that exist between key elements of a person's own self-concept and the of brand image. This means that when consumers evaluate brands such that if their perception of the brand is at a level of congruence between the brand image and their self-concept, they are more likely to exhibit higher levels of both brand preference and brand loyalty (Hong and Zinkhan, 1995; He et al., 2012; Yeh et al., 2016). Other researchers validate this idea, suggesting that customer behaviours, in the form of positive word-of-mouth and brand attitudes, also develop as a result of self-concept/brand image congruency (Sirgy et al., 1997, 1991; Jamal and Goode, 2001). Moreover, self-image congruence has been shown to influence brand satisfaction (Sirgy et al., 1997).

### **2.6.1 Self-Identity and Congruence**

Self-identity, according to Giddens (1991), is a person's self-representation that is perceived as a central component of psychological change. Offering further explanation from a socio-cognitive perception, self-identity is theorised basically as interpersonal and moulded by an individual's past and present experiences (Andersen and Chen, 2002; O'Connor and Barrera, 2014).

Every individual possesses a unique personality that shapes or identifies who they are; hence, the individual holds a perception of themselves as carrying specific abilities, physical attributes and character traits, which causes them to trust they part of a specific social groups rather than others (Kettle and Hauble, 2011). Numerous expressions have employed in an attempt to describe this overall sense of self, including “self-identity”, “identity”, “self” and “self-concept” (e.g. Belk, 1988; Stokeburger-Sauer et al., 2012; da Silva et al., 2013; He et al., 2012; Lam et al., 2010, 2011). The term self-identity for the purpose of this study is used to denote the various selves and identities (including social identities) which encompass an individual’s sense of who they are.

Congruence between the individual’s self-identity and a brand remains a significant aspect of the identification process (Edwards, 2005; Ashforth and Mael, 1989). In support of this view, Dutton et al. (1994) claim that the greater the congruence between a person’s self-identity and a perceived brand identity, the better the chances of the individual to attracted that particular band through improving self-continuity. This is possible since it is relatively easy for the individual to perceive comprehend self-relevant information when that particular brand identity matches his or her self-identity better. It must be emphasised that parity between self-identity and perceived brand identity ensures that members of a certain group are able to express themselves easily. As Dutton et al. (1994) is of the view that, an individual has resilient brand identification when his or her self-concept contains most of the same features that he or she considers describes the brand.

The significance of the above to this study is established in the fact that congruence between a person’s self-identity and his or her perceived brand identity becomes the

foundation of their social identities. Similarly, Xie et al.'s (2014) views an individual's familiarity with a brand or organisation has an effect on their affective identification with that particular brand, hence may further lead to repeat purchase intentions.

## **2.7 Consumer–Brand Identification (CBI)**

Although it is only in recent years that the concept of CBI has gained momentum within the marketing literature, the idea that consumers may identify with companies has earlier origins. The notion of company identification has since transferred to the brand domain. In Bhattacharya and Sen's (2003) seminal work, the authors suggest that customers may have their self-definitional needs partially satisfied by companies and thus they identify with the company (Pratt, 1998; Scott and Lane, 2000; O'Keefe et al., 2016).

Ahearne et al. (2005) elaborate upon earlier ideas in suggesting that customers identify with companies and that identification has an impact on both in-role and extra-role behaviour. More specifically, consumers who identify with a company exhibit greater product utilisation, which in itself serves as an act of self-expression. Consumers also exhibit stronger extra-role behaviours such as positive word-of-mouth when they identify with the company. In accordance with Bhattacharya and Sen (2003), brands may be meaningful social categories for consumers to identify with where identification is defined as an dynamic, selective and volitional act driven by satisfaction of one or more self-definitional needs.

Similarly, social identification theory, the authors suggest that the more consumers identify with brands, the more likely they are to engage in brand-supportive behaviours such as brand reputation protection and brand loyalty (Bhattacharya and Sen, 2003; Ahearne et al., 2005). Bhattacharya and Sen (2003) suggest that when a con-

sumer identifies with a company they receive more than typically thought-of utilitarian benefits such as product value, consistency and convenience. Instead they receive company-based value at a higher level in the form of social identities which help consumers satisfy specific self-definitional needs. Brands as “concrete actualisations” of firms represent social categories with which consumers are able to identify, since meaning may be transferred between brands and the self (Belk, 1988; Fournier, 1998; McCracken, 1988).

In their conceptualisation of CBI, Lam et al. (2010) suggest that the brand serves as a relationship partner to both the “private self” (i.e. such that individuals use the brand to define who they are) and the “social self”, such that individuals consider themselves part of an in-group identifying with the brand. CBI is a psychological state that goes beyond just the cognitive overlap between the brand and the self; it also includes the affective and evaluative facets of psychological oneness with the brand. It can be argued that CBI is at a higher level of abstraction than the less abstract concept of self-brand congruity (Lam et al., 2012). More specifically, CBI is the customers’ psychological state of perceiving, feeling, and valuing their belongingness with a particular brand, which thus illuminates CBI as a formative construct consisting of three dimensions, namely the cognitive, emotional and evaluative dimensions.

Belongingness refers to the psychological oneness resulting from an actual membership of a brand community. In accordance with Stokburger-Sauer et al. (2012) who support the use of the three aforementioned components, CBI may be more extensively defined as the extent to which the brand is incorporated into one’s self-concept through the development of cognitive connection with the brand, valuing this

connection with the brand, and the emotional attachment to the brand (Yeh et al., 2016; Stokburger-Sauer et al., 2012; Da Silveira et al., 2013). As a result of self-categorisation a cognitive connection is formed between the individual and the brand. The evaluative component is the degree to which consumers value their connection with the brand and the value placed on this connection by others. It describes the consumer's feelings towards the brand and towards others' evaluations of the brand. The emotional component is the emotional attachment to the group and to the evaluations associated with the group.

The authors further infer antecedent conditions for CBI, suggesting that the consumption domain identification is driven by the need for self-continuity or self-verification, self-distinctiveness and self-enhancement (Berger and Heath, 2007; Bhattacharya and Sen, 2003; Chernev et al., 2011; Yeh et al., 2016; Stokburger-Sauer et al., 2012; Da Silveira et al., 2013). Thus, identification with a brand is likely to be related to the extent to which a person perceives the brand: 1) to have a personality that is similar to his or her own, 2) to be distinctive, and 3) to be prestigious. The authors propose that other more affect-laden factors (as opposed to the former cognitively-driven antecedents) come into play in predicting brand identification. Specifically, they identify as important the extent to which consumers: 1) feel that their interactions with a brand help them connect with important others, 2) perceive a brand in warm, emotional terms rather than cold and rational ones, and 3) have fond memories of brand consumption experiences. In a similar vein, Kunda (1999) suggests that our need for self-continuity goes hand in hand with our need for self-enhancement, which encompasses the maintenance and affirmation of positive self-views that subsequently lead to greater self-esteem. Such identity-related needs are also met through identification with prestigious entities such as brands (Escalas and

Bettman, 2003; Fournier, 1998; Thomson et al., 2005; Rindfleisch et al., 2009; Yeh et al., 2016; Stokburger-Sauer et al., 2012; Da Silveira et al., 2013).

Brand prestige (the status or esteem associated with a brand) is thus also perceived as antecedent to brand identification in consumers. Hughes and Ahearne (2010) define brand identification as the degree to which a person defines his or her self by the same attributes as he or she believes define a brand. The authors expand on this definition to include the concept of the integration of brand identity with self-identity, describing brand identity as “the set of brand associations from which a person derives functional, emotional and self-expressive benefits”. Other authors highlight how CBI is distinct from other constructs in the branding literature, describing CBI as distinct from the emotional bond that is central to concepts of emotional brand attachment (Malär et al., 2011) and distinct from brand love (Batra et al., 2012).

The extent to which the brand expresses and enhances one’s identity is determined by the level of brand identification and this has a positive effect on word-of-mouth reports (Kim et al., 2001). Identification is often linked to the causes and aims of the organisation; in instances where the organisation is known to stand for a particular cause, consumers are likely to identify with the mission of the company and furthermore to demonstrate loyalty to its products (Bhattacharya et al., 1995; O’Keeffe et al., 2016). Further research that supports this idea illustrates how consumers of a brand are more likely to identify with the brand and be loyal to the brand when it is perceived to be a socially responsible brand (Du et al., 2007). They further suggest that corporate social responsibility satisfies consumers’ self-definitional and self-enhancement needs, causing them to become brand champions as opposed to buyers. Other research has examined what causes consumers to identify with brands.

Social identity with a brand community impacts the consumer's brand identification, where brand identification describes the "extent to which the consumer sees his or her own self-image as overlapping with the brand's image". The consumer's social identity with the brand community strengthens through greater involvement in the community that subsequently promotes the assimilation of the brand image into the consumer's identity (Bagozzi and Dholakia, 2006; He et al., 2012; Yeh et al., 2016; Stokburger-Sauer et al., 2012; Da Silveira et al., 2013).

Bhattacharya and Sen (2003) suggest that self-brand congruity is an antecedent of CBI. Since self-brand congruity captures only a symbolic driver of CBI, it is a necessary but not a sufficient condition for developing CBI. Functional drivers also play an important role in CBI formation (Lam et al., 2012). Ahearne et al. (2005) posit that as an extension of the identification occurring within the context of formal memberships (such as those of academic institution alumni and members of museums), identification does necessarily occur in the consumer-company relationship. In particular, their empirical evidence points towards outcomes of identification in the form of in-role behaviours such as product utilisation and extra-role behaviours such as positive word-of-mouth.

Functional congruity between the brand and the expectations of the consumer leads to clearer identification with a brand. Homburg et al. (2009) report a strong influence of customer-company identification on customer loyalty. Park et al. (2012) propose that the more the brand is incorporated into the self, the more likely consumers are to expend social, financial and time resources on the brand to maintain the brand relationship. For example, consumers are more likely to support the brand with which they identify by repurchasing associated products and services, thereby exhibiting a



long-term preference for the brand and a willingness to pay a price premium. Lam et al. (2010) claimed that CBI inhibits consumers from switching brands. CBI produces brand advocacy in the form of positively promoting the brand to social others. CBI is positively related to brand advocacy, that is, positive word-of-mouth and recommendation behaviour (Ahearne et al., 2005). A number of positive outcomes of identification have been empirically identified such as loyalty (Bhattacharya and Sen, 2003; O'Reilly and Chatman, 1986), commitment (Bergami and Bagozzi, 2000) and brand advocacy (Badrinarayanan and Laverie, 2011).

According to Badrinarayanan and Laverie (2011), when individuals identify with a brand they form a psychological relationship with it, and consequently demonstrate favouritism and work to the benefit of the brand. Consumer–brand identification is positively associated with consumer–brand relationship quality. People who identify with a particular brand experience a positive psychological outcome in the form of enhanced self-esteem, and they engage in positive action strategies towards the brand (Donavan et al., 2006). As mentioned previously, identification is driven by the need for self-continuity, self-distinctiveness and self-enhancement. The necessity for self-continuity suggests that to try to understand themselves and their social worlds, people are motivated to maintain a consistent sense of self (Bhattacharya and Sen, 2003; He et al., 2012; Yeh et al., 2016; Stokburger-Sauer et al., 2012; Da Silveira et al., 2013; O'Keefe et al., 2016). Consumers are therefore expected to consume and identify with those brands which match their own sense of who they are, and in so doing, satisfy their need for self-expression.

## **2.8 Brand Loyalty**

Imperatively, firms focus much attention and investment to develop stronger brands (He et al., 2012). A much stronger brand in today's competitive market is inevitably influential in establishing a sustainable competitive advantage (Bhattacharya and Lordish, 2000; Aaker, 1995; Mizerski and Soh, 2012). The shift to a relationship marketing paradigm positions brand loyalty at a relational focal point (Oliver, 1999; He et al., 2012; Ozuem et al, 2016; Giovanisa and Athanasopouloub, 2018). Brand loyalty has conventionally been regarded as a behavioural construct linking to repeat purchase intentions (Gremler and Brown, 1996; Nam et al., 2011).

Brand loyalty has been defined as an extreme commitment to repurchase or repatronise a particular product or service on a consistent basis, triggering repetitive same-brand purchases, irrespective of other influence and marketing efforts aiming to cause switching (Oliver, 1999). Similarly, Dimitriades (2006) shares this view and specifies that satisfied consumers are less sensitive to changes in prices, less persuaded by competitor attacks, and most importantly loyal to a particular brand or firm for longer than dissatisfied ones.

In line with Dimitriades (2006) and Oliver (1999) above, loyalty to a brand is expressed with a positive attitude, which motivates a consumer to repetitively demand goods or services of a certain brand over a considerable period of time (Dwivedi, 2015; Liu et al, 2012). Those with the same viewpoint insist that consumers might have a strong attitude that potentially has an effect on their behaviour towards a specific brand. This phenomenon is denoted as brand insistence (Copeland, 1923; Leckie et al., 2016). Brand insistence is further described in terms of recognition, preference and insistence.

### **2.8.1 Behavioural and Attitudinal Loyalty**

Irrespective of the existence of studies based on brand loyalty, the majority of these investigate consumer loyalty from two perspectives. The two main schools of thought underscoring the definition of brand loyalty are behavioural and attitudinal loyalty (Dick and Basu, 1994; Ozuem et al., 2017; Bandyopadhyay and Martell, 2007; Ball et al., 2004; Ringberg and Gupta, 2003).

Customer loyalty in earlier research was perceived behaviourally, thus considering the concept as a behaviour involving repeat buying of a preferred brand. This behaviour has been evaluated either by the sequence in which goods and services are purchased, as a proportion of purchases, as an act of recommendation, as the scale of the relationship, its scope, or as a measure of most of these criteria put together (Hallowell, 1996; Homburg and Giering, 2001; Yi, 1990). Nam et al. (2011) affirmed this notion by asserting that loyalty has traditionally been regarded as a behavioural construct linking consumers' intentions towards repeat buying. Put simply, Nam et al. (2011) refer to behavioural loyalty as the frequency of repeat purchases. Ehrenberg et al. (1990) insist that repeat buying may capture consumers' loyalty towards a preferred brand.

Kuusik and Varblane (2009) categorised three sub-segmented motives of behaviourally loyal customers: consumers who are (i) forced to be loyal (e.g. by monopoly or high switching costs), (ii) loyal due to inertia, and (iii) functionally loyal. Oliver (1999) attaches the concept of inert loyalty to routine purchases, so a sense of satisfaction is not experienced and it becomes a task. From a marketing perspective, this provides suggestions that behaviourally loyal customers will continue to be passively loyal as long as there are no particular 'triggers' to instigate change (Roos, 1999).

According to Liu et al. (2007), even consumers who are exposed to attractive alternatives and have high inertia will be reluctant to change. Kuo et al. (2013) link this tendency to consumer familiarity and a perception that frequenting a familiar service provider requires less effort. They state that consumer inertia has a great influence on repeat purchase intentions, and they recommend that managers make efforts to develop consumer consumption inertia.

Day (1969) criticised this one-dimensional view as behaviourally centred, and therefore not particularly useful to distinguish true loyalty from “spurious loyalty”. Subsequent studies have acknowledged the need to add an attitudinal element to the behavioural one (Berné et al., 2001; Dick and Basu, 1994; Jacoby and Kyner, 1973; Oliver, 1997). Correspondingly, Day’s criticism was embraced by Uncles and Laurent (1997) who argued that by classifying these behavioural observations as a form of loyalty, there is a tendency to overlook customers who are emotionally attached to a particular brand. The consequences of this are overestimations of loyalty customer bases and the stability of portfolios (Crouch et al., 2004). Significantly, Dick and Basu (1994) argue that a positive attitude and repeat buying was perfect to define loyalty, considering loyalty as an attitude-behaviour relationship in their framework.

Attitudinal loyalty, on the other hand, is defined as capturing the emotional and cognitive constituents of brand loyalty (Kumar and Shah, 2004; Ozuem et al., 2016). Oliver (1999) supports this description by describing loyalty as an extreme commitment to consistently repurchase or re-patronise particular brands, despite other influences and marketing efforts with the potential to cause or instigate switching behaviour. Brand commitment, therefore, is the vowing or obligation of a person to a specific brand within a product category (Lastovicka and Gardner, 1977). Chaudhuri and

Holbrook (2001) treat brand commitment as synonymous with attitudinal loyalty. The issue of commitment is discussed in more detail in the next chapter.

Attitudinal loyalty signifies long-term and emotional commitment to a preferred brand (Bennett and Rundle-Thiele, 2002; Shankar et al., 2003; Appiah and Ozuem, 2018) and is hence regarded as being much stronger and longer-lasting (Hofmeyr and Rice, 2000). The idea has been compared to marriage (Albert and Merunka, 2013; Dwyer et al., 1987).

Consistent with the above, attitudinal loyalty denotes the psychological commitment made by a consumer in the purchase act, for instance a consumer's intention to acquire and recommend without necessarily taking repeat purchase behaviour into account (Jacoby, 1971). Jacoby and Kyner (1973) supported Jacoby's (1971) position on brand loyalty. Their definition was expressed as a set of six necessary and collectively sufficient conditions as follows: brand loyalty is (1) biased (non-random), (2) a behavioural response (purchase), (3) expressed over time, (4) undertaken by some decision-making unit, (5) fulfilled with respect to alternative brands, and (6) a function of psychological (decision-making, evaluative) processes. They specified that it is process of evaluation (the last condition) which develops a consumer's brand commitment. This perception of commitment, they argued, offers a fundamental foundation for differentiating brand loyalty from other types of repetitive buying behaviour.

Attitudinal loyalty is favoured over behavioural loyalty (Day, 1969; Dick and Basu, 1994; Appiah, 2014) due to the reasons established as follows. A behaviourally loyal customer may be spuriously loyal, meaning they remain loyal to a brand until an improved alternative becomes available in the marketplace (Dick and Basu, 1994). A customer who is attitudinally loyal, on the other hand, has some attachment or com-

mitment to a brand, and such a consumer is not effortlessly persuaded by other alternatives. Attitudinal loyalty not only indicates higher repurchase intentions but also provides resistance to persuasion and subsequent switching. It is an indicator of consumers' inclination to pay premium price and readiness to recommend a specific brand to others.

Based on these reasons, this study adopts the idea of attitudinal loyalty towards a brand and defines brand loyalty as the consumer's intention to repurchase a specific brand or inclination to recommend the brand irrespective of price change. The ultimate choice of attitudinal loyalty is underscored by Shankar et al. (2003), who perceived attitudinal loyalty as parallel to the type of affective or cognitive loyalty proposed by Oliver (1999), representing a long-term commitment of a customer to a brand, which cannot be inferred simply from monitoring customers' repeat purchase behaviour (Lam et al., 2013; Appiah and Ozuem, 2018).

## **2.9 Customer Satisfaction and Loyalty**

Customer satisfaction refers to the psychological state ensuing when the emotion surrounding disconfirmed expectations is combined with the consumer's prior feelings about the brand experience (Oliver, 1981). Consistent with this view, Shankar et al. (2003) define satisfaction as the perception of a service or product providing pleasurable fulfilment.

Elaborating on the positive relationship between customer satisfaction and loyalty discussed by Shankar et al. (2003), Taylor and Baker (1994) also confirm that customer satisfaction is widely recognised as a key influence in the formation of consumers' future purchase intentions. Similarly, satisfied customers are more likely to tell others of their favourable experience and thus engage in positive word-of-mouth

advertising (File and Prince, 1992; Badrinarayanan and Laverie, 2011, Bagozzi and Dholakia, 2006; He et al., 2012; Yeh et al., 2016).

Rodriguez del Bosque and San Martin (2008) are of the view that consumer satisfaction is not only cognitive but also emotional. Consumers show satisfaction with a brand when brand identification augments their positive image within a social group, or when a sense of belonging to that social group is achieved (Ferreira, 1996; Kim et al., 2001; He et al., 2012). Brand identification encourages symbolic interaction, emotional bonding and brand loyalty. As indicated by Peter and Olson (1993), 94 per cent of Harley-Davidson buyers are emotionally attached to the brand. They not only enjoy the quality of the motorbikes but also enjoy the experience of being part of the brand community, and so they remain loyal. From this notion the current study proposes that stronger consumer identification with a brand translates into consumer satisfaction.

Satisfaction is theoretically referred to as an affective-oriented assessment of the services provided and as such is the emotive aspect of loyalty (Bourdeau, 2005; Cronin et al., 2000; Oliver, 1999). According to Howard and Sheth (1969), when deciding whether to switch to a competing retailer, customers are often guided by their feelings of satisfaction/dissatisfaction with the retailer.

Solomon (2002) suggests that lifestyles comprise shared values, tastes and consumption patterns. Hence he perceives brands and brand settings as a communication of lifestyles. The more a brand image fits a consumer's lifestyle, the higher the level of satisfaction with the brand experience. Therefore, marketers ensure they are able to develop consumer satisfaction with brands by creating a brand which equals

the identified lifestyle (Badrinarayanan and Laverie, 2011; He et al., 2012; Foxall et al., 1998; Solomon, 2002; Yeh et al., 2016).

Past research proves a positive relationship between consumer satisfaction and brand loyalty (e.g. Back and Parks, 2003) and this is supported by Rust and Zahorik (1993), when they demonstrated a connection between consumer satisfaction and brand loyalty. McDougall and Levesque (1994) show that customer satisfaction impacts positively on brand loyalty. Hence, consumer satisfaction with brand experience has a positive effect on brand loyalty (Badrinarayanan and Laverie, 2011). The next section and subsections proceed with discussions of switching, together with the different factors and determinants which affect consumers who switch from one product to another. They look at two main switching behaviours relevant to this study.

## **2.10 Brand Switching**

The function of identity in loyalty literature and its causal effects on brand switching proponents (BSP) in the context of Smartphone purchases is considered in this section. Contextually, the Smartphone was utilised as a relevant product category for this study mainly as it denotes an industry within which brand switching is expected due to the multiple alternatives and short inter-purchase frequency that define the setting for innovative disruptions (Campo et al., 2000; Goldsmith, 2000; Jung et al., 2017).

Switching is likely to happen at any time a customer is motivated to review available alternatives of the same product within the same marketplace due to variations in competitive activity (Seiders and Tigert, 1997; Jung et al., 2017). Similarly, Hogan and Armstrong (2001) insisted that brand switching is the act of replacing an incum-



bent brand with a favoured one from the same category in order to achieve satisfaction. Sathish et al. (2011) indicated that brand switching is a consumer behaviour that depicts differences centred on consumers' satisfaction levels. Hence, brand switching is the process of being loyal to one product or service for a period of time but decide to swap for another, due to dissatisfaction or change in preferences. They further suggest that even if a consumer is loyal to a selected brand but subsequently establishes dissatisfaction, he/she may switch to a competing brand. Therefore, brand managers must consistently evaluate and redirect resources and capabilities into a product to ensure a strong position (Itami and Roehl, 1987).

Losing a consumer is a serious setback for a firm as it can have severe implications both financially and for its market position. Reinvesting resources in attracting new consumers can have huge costs in advertising and promotions. Peters (1987) confirms that it may cost a firm five times more to obtain fresh customers than to keep present ones.

Product features may likely affect exploratory behaviours such as BSPs and innovation in product contexts with a wider options and a short inter-purchase frequency (Hoyer and Ridgway, 1984). The characteristics named above may comprise perceived risk, brand loyalty, perceived brand differentiation/similarity, hedonism (desire) and strength of preference (Van Trijp et al., 1996; Hoyer and Ridgway, 1984). Consumers who become extremely engaged with a brand, are less likely to switch (Sloot et al., 2005; Hoyer and Ridgway, 1984).

Consumers with high involvement with a product have a slim latitude acceptance (Sherif and Sherif, 1967; Giovanisa and Athanasopouloub, 2018); they remain doubtful to be persuaded to other alternatives, and on the same issue Sloot et al. (2005)

agree that loyal customers may be highly unlikely to switch to an alternative. Activities to persuade consumers to switch usually be demonstrated as sales promotions, typically as offers and discounts that most often encourage switching across numerous product categories (Kahn and Louie, 1990).

Perceived risk is an indicator that consumers are worried about potential losses as a result of their purchases (Mitchell, 1999; Jung et al., 2017). High perceived risk creates avoidance behaviours such as commitment, repeat buy, as consumers are usually motivated not to commit mistakes instead of utility maximisation in purchase activity (Mitchell, 1999). Perceived similarity amongst brands in the product category also reflects a high tendency of consumers to possibly switch.

Hedonism encourages switching in certain product categories (Van Trijp et al., 1996; Hoyer and Ridgway, 1984). Hedonism is related to the pleasure that a consumer gains from a selected product (Griffin et al., 2000), as consumers are innately inspired by products that provide (hedonic) feelings (Hirschman and Holbrook, 1982; Giovanisa & Athanasopouloub, 2018) and are consequently expected to trigger repeat purchase intentions and elicit switching inclinations (Van Trijp et al., 1996).

### **2.10.1 Innovations and Market Disruptions**

The ultimate cause of brand switching is market disruptions. Market disruptions are key happenings in a market which more often than not impede customer–brand relationships (Fournier, 1998; Stern, Thompson and Arnould, 1998; Christensen, 2013; Jung et al., 2017). Disruption is therefore a state where markets cease to operate in their usual routine, characteristically with steep and huge market declines.

This research focuses on disruptions that occur within product markets. As noted by McGrath (2011), the concept of “market disruption” that occurs in a product market directly harkens to research in two significant areas, technology and innovation, which in recent times have attracted significant attention and development by firms in the Smartphone industry. Disruptions displace and alter how we think, behave, transact business, learn and go about our daily undertakings. This is echoed by Christensen (2013), who states that disruptions displace existing markets, industries and technology by developing something unique, more efficient and more worthwhile.

The theory of disruptive innovation introduced by Christensen (2013) provides clarification for the displacement of industry giants by lesser competitors, opening a channel for new entrants (Bower and Christensen, 1995; Christensen, 2013; Abou-Shouk et al., 2016; Giovanisa and Athanasopouloub, 2018). Disruptive innovation creates a new market as well as disrupting existing ones. The term is applied in business and technology to designate innovations that improve products or services beyond market expectations; first by generating a different set of consumers in the new market, and later by lowering prices in the existing market.

According to McGrath (2011), the concept’s explanatory power is derived from the belief that industry incumbents and new entrants rely on technological trajectories. Industry front-runners tend to lay more emphasis on and invest in sustaining innovations that constantly improve their leading products and increase their overall performance in attributes that are perceived as being important for their existing customer base. In the long term, the performance increase accomplished by sustainable innovations begins to overshoot the expectations of the loyal customers who pay the

most, while the fresh entrants' who disruptive products develop and establish to meet dominant incumbents' needs.

Christensen (2013) identified a number of industries in which the pattern of disruption closely fits with his theory. These include retail, computers, hospitals and automobiles but there has been little research into how these disruptions impact upon and affect the perceived value of brands in disruptive times. Various factors and determinants cause consumers to switch from one brand to another. The next section looks at two main switching behaviours for the purpose of this study.

### **2.10.2 Brand Switching as Functional Utility Maximisation**

Seiders and Tigerts (1997) and Appiah & Ozuem (2017) share the view that switching happens when there are changes in competitive activities that cause consumers to have enough reasons or motivation to look elsewhere for desirable substitutes in the marketplace. McFadden (1986) believed that consumers' ultimate choice is to satisfy functional utility maximisation. This notion has to a large extent been used as a basis for market researchers to model consumer brand switching as a customer choice, with foundation on product features (Guadagni and Little, 1983).

Nonetheless, the multi-attribute utility theory stipulates that consumer utility is not composed only of the brand's functional attributes, therefore included is the brand's socio-psychological attributes (Lancaster, 1966). Subsequent research based on choice modelling have emphasised the need to integrate non-product related attributes into prototypes of brand preferences and switching (Ashok et al., 2002; Swait and Erdem, 2007; Jung et al., 2017). In respect of consumer preference and brand choice, these soft attributes such as customers' attitudes and perceptions have a significant influence on consumers.

Switching behaviour as functional utility maximisation is highly influenced by relative perceived value, such as when consumers face difficulty in producing positive information about their brand preferences and alternative positive information presents a reliable basis for their choice (Wänke et al., 1997). Lam et al. (2010) provided a clear and precise explanation of “relative perceived value” as how the utilitarian value of a brand’s functional attributes exceeds that of an alternative brand in the same product category

### **2.10.3 Brand Switching as Social Mobility**

In contrast with McFadden (1986), Guadagni and Little (1983) and Seiders and Tigerts (1997), social identity theory upholds that brand switching additionally seeks to perform socio-psychological roles aside functional utility maximisation (Rao et al., 2000; Tajfel and Turner, 1979; He et al., 2012; Kumar and Shah, 2004; Ozuem et al., 2016). Consumers belong to social groups and may differentiate from other consumers that may not identify with same affiliations as they value their memberships with these groups. This is a strong indication that consumers acquire their identity through affiliations with social groups (He et al., 2012).

However, Lam et al. (2010) is of the view that a social identity when negatively perceived, with an in-group leaves its members threatened, which causes them to react and adopt the following approaches: social mobility, social creativity, and social change. Social mobility occurs when the individual takes the decision to leave or detach him/herself from a group considered to be of a relatively lower status in order to join a higher one (ibid.). Social creativity refers to the situation where a person in a threatened group decides to move around in an attempt to look for uniqueness for an in-group by repositioning the elements of the comparative circumstance (Tajfel and

Turner, 1979; He et al., 2012). Elsbach and Kramer (1996) offer an instance where an organisation does not compare favourably with others and may look for specific attributes and elements to give it comparative advantage. Lastly, social change is the circumstance where there is significantly direct rivalry between the out-group for an advanced status. From a marketing perspective, social change is mostly instigated by a competitor or by a customer with affiliations with a rival brand (He et al., 2012; Jung et al., 2017). Most disruptions that occur in a particular market are as a result of competitor activities (e.g. the introduction and release of innovative brands) which are mainly deliberate, to trigger social change to earn favour from customers. Typically, in cases where new brands are launched on to a market, some customers tend to develop a perception that attracts them to the brand, causing them to perceive the new brand as an attractive identity compared to that of the incumbent brand.

It is very likely that customers breed negative word-of-mouth in respect of brands which they may not identify with, specifically when they have been exposed to such relative publicity. From the identity theory point of view, this study proposes that customers may be tempted to switch between brands in search for self-enhancement, to make best use of socio-psychological benefits rather than functional utility. To further consolidate their position on social mobility, Rao, Davis and Ward (2000) cited the instance of companies switching from the National Association of Security Dealers Automated Quotations (NASDAQ) stock market to the New York Stock Exchange (NYSE) to maintain an optimistic identity.

From a marketing perspective, in research into cultural assimilation it has been observed that migrants exchange cultural identities thorough assimilation into the conventional culture through their purchase intentions (Oswald, 1999; Stern et al.,

1998). In support of the argument put forward by Oswald (1999) and Stern et al. (1998), Chaplin and John (2005) similarly posit that as children grow up and become adults, they acquire sophisticated self-concepts that affect their brand preferences. However, situations may change, rendering social mobility an ineffective strategy to cope with identify threats, especially in circumstances where the margin that exist within the in-group and the out-group is very resistant and impermeable and switching group membership seem unrealistic. A very good instance of this is that individuals seldom switch political affiliation. This is because social identity theory confirms that in conditions like that, members of a political party would rather embark on social creativity (Tajfel and Turner, 1979; He et al., 2012).

Social creativity is regarded as an identity-based comparison which is founded on the prejudices of members of an in-group, defined as a resilient trust in the supremacy of the group that members belong and with which they identify. Tajfel and Turner (1979, p. 43) suggest that social creativity may assume a number of forms elaborated below:

- *constantly making comparisons between the in-group and out-group based on innovative dimensions*
- *altering the values given to the characteristics of the group, in order to convert previous negative connotations to positive ones*
- *avoiding making reference to or comparing the in-group to out-groups with relatively high status.*

In support of Tajfel and Turner's (1979) view above, Brewer (1979) suggests that such in-group preconceptions are cognitive and motivational, particularly when

they serve as motivation for individuals who identify with the in-group, and these could be brand identifiers.

Table 2.1 below shows a summary of the key authors and their views on the two main concepts of brand switching: as functional utility maximisation and as social mobility.

**Table 2.1: Summary of two main perspectives to brand switching**

Author(s)	Year	Switching as functional utility maximisation	Switching as social mobility
McFadden	1986	Economists view consumer choices as a means to achieve maximisation of functional utility	
Guadagni and Little	1983	Modelling brand switching as selections based on product attributes and marketing mix	
Seiders and Tigerts	1997	Switching occurs when a customer is motivated to review their available alternatives in the marketplace due to a change in competitive activities in the market	
Hogan and Armstrong	2001	Brand switching entails substituting an incumbent brand with another to achieve competitive advantage	
Tajfel and Turner	1979		Social creativity describes a person's attempt to seek positive distinctiveness for the in-group by redefining or altering the elements of the comparative situation
Rao, Davis and Ward	2000		Social identity theory indicates that brand switching also serves socio-psychological purposes besides functional utility maximisation
He, Li and Harris	2012		
Oswald	1999		Cultural assimilation shows that immigrants swap their cultural identities in consumption as they assimilate with mainstream culture



Chaplin and John	2005		As children mature into adolescents, their self-concept becomes more sophisticated and so do their connections with brands
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## 2.11 Conclusion

In exploring the branding literature, this initial part of this chapter explained the origin and meaning of brands. This section has established that brands and the ideas behind them evolved many years ago.

The brand loyalty literature and the gap in the literature which form the foundations for this study were examined and two main limitations that call for further investigations were identified. These two limitations are highlighted below.

First, the sustainability of brand loyalty predictors refers to brands that stand the test of time and market disruptions. However, drawing from the above definitions, the brand loyalty literature mainly touches upon how brands perform under normal market conditions, but in today's complex business environment disruptions are commonplace.

A second limitation is identified when perceived value is conceptualised and operationalised as functional utilitarian value. As it appears in the brand loyalty literature, it does not capture other non-utilitarian factors such as socio-psychological benefits that might motivate customers to continue buying.

The next part of the chapter examined two competing perceptions of switching behaviour. It was established that switching occurs when a customer is motivated to review available alternatives in the marketplace due to a change in competitive activ-

ities in the market. In light of the above, a review of the two perspectives (brand switching as functional utility maximisation and as social mobility) was carried out.

The next chapter considers the implications of identity theory for brands. Thus the impacts of brands on consumer identities are considered alongside the possible impact of consumer identities on brands, and most importantly the managerial implications are discussed.

## **CHAPTER THREE**

### **IDENTITY THEORY LITERATURE**

#### **3.1 Introduction**

This chapter sets the theoretical context upon which this study is undertaken. It presents the historical roots of identity theory in symbolic interactionist thought, revisiting some of the major ideas of early and contemporary philosophers to give a deeper understanding of the background of identity theory. Initially, various definitions of 'identity' are explored from two different perspectives: specifically, social and personal perspectives. A review of the conceptualisation of identity, including an examination of Goffman's contribution to the conceptualisation of identity, is also contained within this chapter.

#### **3.2 Identity Theory and Brand Switching**

In practice, brands reflect a dynamic and ongoing dialogue between companies and customers (Frank, 2001). According to de Chernatony (2001), brands are complex entities that can be simplified to the level of functional and emotional value. In view of this, it can be said that customers develop a strong relationship with brands to form a unique identity (Fournier, 1998). This complexity requires an in-depth review of the impact of identities on brand loyalty and switching behaviour.

Identity theory and self-concept literature are interlinked as both examine the relationship that exists between the self and social entities (Belk, 1988; Sirgy 1982). Both theories are introduced into marketing because they have common concepts,

and the current study therefore draws upon this theory to conceptualise CBI. In so doing, a brand is perceived as a relationship partner that is significant to the private self. Thus the consumer relies on a preferred brand as a definition of what they are in society or part of a wider group that identifies with the brand (the social self). From the above discussions, it can be said that shoppers re-purchase specific brands that convey meaning which transcends simple product utility. Before offering a detailed review of identity theory, this study initially explores various definitions and perspectives of identity.

An identity is a collection of meanings which defines a person, as an occupant of a certain role in a social setting, affiliated to a group, or with certain acceptable features identifying a person as unique (Burke and Stets, 2009; Yeh et al., 2016; He et al., 2012). Gleason (1983) observed that the meaning of identity, as we currently use it, is not well captured by dictionary definitions, which reflect older senses of the word.

Fearon (1999) posited that identity is used in two ways, social and personal. 'Identity' as used in the former sense denotes a social category; thus a group of people particularly labelled and distinguished as members with similar features or attributes. In the latter sense of personal identity, upon which this study focuses, an identity consists of distinctive features or characteristics which an individual accepts with pride, or opinions that are socially consequential but unalterable. Personal identity involves seeing oneself as a unique and distinct individual who is different from others (Burke and Stets, 2009; Yeh et al., 2016; He et al., 2012; Da Silveira, 2013).

Drawing from the above, it is striking that the definitions of 'identity' appear to make reference to a fundamental concept, thus a sense of recognition, despite the diversity.

### **3.3 Goffman's Contribution to Identity Conceptualisation**

Personal Identity, from Goffman's perspective, points to the direction of an individual's biography. It encapsulates an individual's uniqueness, which is what makes that individual different from others in the social field. Goffman holds the view that each individual is identified by peculiar signs displayed at a certain time either at a point in the past or now, which he believes will not stop. This means is that the symbols and marks distinguishing an individual from another becomes our personal identity, not own sense of being. This as matter of fact could be our biography, our personal data, our fingerprints, etc. According to Goffman, (1968) optimistic characters or symbols is what he perceives as personal identity, he refers to these as a grouping of distinctive life history that a person becomes known for or identify with.

The explanation given above represents a complex and uninterrupted profiling of who we are as individuals, instead of our inner essence, our feelings, and how we exist in society.

Goffman (1959, 1967) considered the social and contextual aspects of identity formation and made a significant contribution to the conceptualisation of identity through the inclusion of his influential perspective on what identity is, categorised into four major conceptions as:

- *Performance*

- *Socially constructed*
- *Dynamic process*
- *Sense of balance between expressions a person gives and the expressions a person gives off.*

***Identity as performance:*** In his initial supposition, Goffman shares the view that our actions are social performance, thus the activities of an individual who has the ability to impact on other individuals in a stipulated time (Goffman, 1959). The social activities in this notion are the focus here, which Goffman (1967) defines as a set of interactions that happen at any given time among a group of individuals in a given place. Social activities, according to Goffman, involve more than one person engaged in face-to-face or facilitated interaction with others, where these activities present a special opportunity for social performance.

Individuals possess the ability to shape the impressions they create through their performances and their identity, which has an effect on others in society, and this is a view shared by Goffman (1959, 1967). This is emphasised by Hatch and Schultz (2004) they way the self efficiently accomplishes for individuals impacts on other people. In our daily activities as we present ourselves to others in society or to a group of people in a certain way that defines or identifies us. Instances are given where individuals or groups of people decide to use stage props, such as academic attire for academics and white coats for doctors, in order to portray a certain identity (Simon Clarke, 2011).

***Identity as socially constructed:*** Through interactions with others in society, people create and establish their identities. Goffman (1959) posits that people portray a perfect view of themselves by embedding socially accepted values in their

activities, while they simultaneously make a conscious effort to hide aspects of themselves which they do not want others to see.

The practice of creating our identities draws upon non-existent or ideal situations, denoting people's identity as a mask, thus the self that they wish to be identified as by others in society. The notion of one's identity professed as a mask and the self that they would ideally like to be is what Park (1959) considered as part of a wider metaphor of dramaturgical performance, when he posited that each individual has a role to perform and eventually people will be known for the roles they perform, as such it is in through these roles that we know each other.

Drawing on Park's position above, an individual's conception of his or her role becomes second nature and forms a fundamental aspect of his or her personality. This role assumed by a person is performed on a consistent basis, eventually becoming an identity.

***Identity as a dynamic process:*** The notion of 'face', according to Goffman, is a very significant concept which he believes is a good social trait a person acquires and for the self (Goffman, 1967). He further refers to this line that others assume a person has taken as the performance through which he wishes to articulate his opinion of a social activity, and through which he evaluates partakers, especially himself. This means that the consistency of a particular face over a specific period of time is critical (Goffman, 1967), in the sense that once a person adopts a particular face he must live with it and ensure that he maintains consistency with the face he has decided to adopt in society as a social rule.

Other partakers of social activities come to realise they are in a situation of social instability if they find out that a familiar face is under threat and not showing consistency in a social activity. To ensure the avoidance of threats and create social stability, “face-work” was used by Goffman (1967, p. 15) to define the modifications that a participant makes in a social activity to ensure or maintain the consistency of an adopted face. It can be drawn from this that individuals in each social setting engage in “face-work” in order to sustain that social norms and order of the group they belong within society. This creates an identity dynamic as there is the need for persons to continuously take steps to maintain a consistent face.

***Self-identity balances the “expressions given” and “expressions given off”:***

Goffman (1959, p. 2), provided clarification between two modes of communication. First, he talks about “expressions given”, which he explains as intentional and conscious forms of expression, and secondly “expressions given off”, which he elaborates further as unintentional. It is understood that a person in a social setting consistently tries to show their face in an approved manner. Therefore, the audience in that social setting uses the expressions that a participant gives off to accept the validity of expressions given by the participants. Any inconsistencies in either expression forces the audience to discredit the individual involved.

The contribution made by Goffman has far-reaching implications for the reconceptualisation of brand identity, discussed as follows. First, a basis is provided to perceive identity as developing constantly over a period of time through inputs from other social participants such as consumers and brand managers. Secondly, from Goffman’s assumptions above, brand identity must evolve dynamically to sustain the brand face, relating ‘face’ to the context used by Goffman (1967). This



study employs the use of face in the same context as a positive value expected to have positive impact on consumers. A third assumption is made that the role that brand managers and other social actors like consumers expect the brand to play within a specific market may eventually assume the brand identity itself. Finally, shifting to brand management, the gap between brand identity and brand image is tightened when consideration is given to Goffman's view of maintaining the right balance between expressions given and expressions given off.

### **3.4 Structural Symbolic Interactionism**

The term "structural symbolic interactionism" was coined by Stryker (1980, 2002) to refer to a set of ideas about the nature of individuals and their relationships within society. Burke and Stets (2009) posit that symbols provide a shared view of the world by providing names and meanings for a large number of objects and categories that are relevant to social interaction. These meanings are shared, and learned through interactions. Hence, they form the basis of expectations for the behaviour of individuals. For instance, if a person responds to a particular symbol in a certain way, then that individual would expect a similar response.

Among the important things an individual learns to name, and hence respond to, are "positions" in society. The meanings also form the basis of the expected behaviours (roles) associated with the position as it relates to other positions in the overall social structure (ibid.). The behaviours are also symbolic and convey meanings. However, what is important in the interaction is not the behaviours themselves, but the meanings of the behaviours which Blumer (1962, 1969) referred to when he coined the term "symbolic interaction". Stryker pointed out that the fact that these symbolic in-

teractions occur within the structures of society and are highly dependent on those structures means they are what he terms “structural symbolic interactions”.

Some important points on which structural symbolic interaction is based are organised around three central concepts: the self, language and interaction, which are elaborated upon below. The ensuing discussion of self, language and language, according to Burke and Stets (2009), forms the outline of the structural symbolic interaction perspective.

### **3.4.1 The Self Concept**

Burke and Stets (2009) explain that the self originates in the mind of a person and is that which characterises an individual's consciousness of his or her own being or identity. They hold the view that the self has the ability to take itself as an object, to regard and evaluate, to take account of itself and plan accordingly, and to manipulate itself as an object, in order to bring about future states. McCall and Simmons (1978, p. 52) indicated “The individual achieves selfhood at that point at which he first begins to act towards himself in more or less the same fashion in which he acts towards other people.”

Consistent with this position on the self, Mead (1943) also shares the same view that the self goes through stages of development initially from birth through processes of social experience and activity, which means it does not just come into existence. Mead (1934) elaborates further that the “self” grows out of the mind as the latter interacts with its environment to solve the problem of sustaining the biological organism (person) that holds it.

To develop upon this discussion, Burke and Stets (2009) insist that the self is able to be both subject and object; however, they do not want to give the impression that the self is a little “person” or homunculus residing inside of us that does these things. The self is rather an organised set of processes within us that accomplishes these outcomes. The responses to the self as symbolised objects are from the points of view of others with whom we interact, and this implies that our responses are like their responses, and the meaning of the self is a shared meaning. Thus paradoxically, as the “self” emerges distinctively, there is, simultaneously, a unification of perceptions of the self and others with whom objects interact. Hence the self is both individual and social in its character; an opinion shared by Burke and Stets (2009).

Because the self emerges in social interactions within the context of a complex differentiated society (Stokeburger-Sauer et al., 2012; da Silva et al., 2013; He et al., 2012; Lam et al., 2011), and because people occupy different positions within society, the self reflects this differentiation into components, or what James (1890) calls “multiple selves”. Each of these smaller “selves” within the overall self is called an identity. Thus, self as a father is an identity, as is self as a colleague, self as storekeeper, self as student, and self as any of the other myriad of possibilities corresponding to the various roles one may play. Burke and Stets (2009) claim that language is symbolic communication, and they hold the view that each individual is a producer and a hearer of language (having a self). A person may carry on communication with himself or herself in the form of thought as chains of reasoning and as imagined possibilities, dealing with both things present and things not present.

### **3.4.2 Subject/Object Relationship of the 'Self'**

The self has the ability to take itself as an object, to regard and evaluate itself, to take account of itself and plan accordingly, and to manipulate itself as an object in order to bring about future states (Burke and Stets, 2009). As McCall and Simmons (1978, p. 52) point out, "the Individual achieves selfhood at the point at which he first begins to act towards himself in more or less the same fashion in which he acts towards other people". This reflexive behaviour is the core of the self, and enables the self to be both subject and object.

Overall, representation and the objective world encompass two extremes. One extreme is the knowing subject without world; the other is the external world without subject; they are in fact one and the same thing considered from two opposite points of view (Schopenhauer, 1966, pp. 15-16). According to Howell (2013) the distinction between subject and object may also be considered when we identify others in the world, and this is accepted through undertaking data collection.

According to Howell (2013), the starting point for dealing with this issue could be Hegel (1977) and the naive mind's emergent comprehension of reality external to an individual. There is an awareness of the mind and body through subjective and objective self-consciousness, but being aware of the self subjectively is not enough to allow self-consciousness because this is unable to sufficiently inform human beings of what they are like in the world. The self requires an objective acknowledgment of its own consciousness in order to offer an understanding of its own reality. Only human beings possess this ability, through reflecting consciousness as a sense of their own external being.

In the above context, Howell (2013) concludes that objective truth lies in mutual recognition; thus, the recognition of others in the world. Others define 'self' and 'self' defines 'self' in relation to the definition of 'others'. Community defines 'self' and 'self' defines community. Hegel (1977) argues that this is not straightforward because initially the existence of the 'other' will be perceived as a threat to being and a negation of the 'self'. He explains further that the subject deals with the 'other' by treating it as a thing and validates its own image as an entity in control of a sea of things. Since the subject does not yet see itself in an objective way, it treats other consciousness as entities to be controlled. In a research context, Howell (2013) explains that, initially, the other is something to be analysed and assessed in an external fashion; a positivist's position initially exists. However, through recognition of other and community, a form of unity prevails and perception may shift towards constructivists' ontological and epistemological positions, which are discussed further in Chapter Four.

### **3.5 Structuration**

The theory of Structuration, propounded in the early 1980s, has limited clarity in today's multicultural, technology-driven and globalised society (Parker, 2000). Conversely, others, particularly Stones (2005), honed and extended Giddens' original work to reflect the inherent and complex contradictions of the social order in the contemporary context of this world (Stones, 2005).

Giddens (1984), in his theory of structuration, brought together objectivist social theories (the assumption that an individual's action is shaped by social reality that exist independently of the individual) and subjectivist ones (with the notion that there is no social reality that exists except what a person constructs through interpretations and opinions). Giddens presents social structure as a duality, both external reality and

something internalised, which actors know through their actions in a social (hermeneutic understanding). Externally, social structures are characteristically grouped into those of legitimation, domination and signification, corresponding with the internal structures of interpretive schemas (the 'framework' for our worldview), social norms (thus, values, roles and ethical codes) and capacity (ability to distribute resources or influence people).

Stone's (2005) refinement of Giddens' theory considers four analytically different and distinctive parts of the structure-agency relationship in respect of: (a) external structures (circumstances of action, either permitting or restraining); (b) internal structures within the agent (a person's knowledge); (c) active agency (drawing, consistently or purposefully, on internal structures); and (d) outcomes (both external and internal structures are either replicated or altered).

External structures are facilitated largely through position-practices (Cohen, 1989). Social position and associated identity and practice are what is known as Position-Practice, existing together with the network of social associations. Position-practices as described are not just structural 'slots' within which agents are largely exchangeable, but altered by enactment by active agents within the network of relationships. Internal structures may be analytically grouped into further categories as attitudes, skills, ambitions and individual morals, which Bourdieu (1986) refers to as 'habitus' and knowledge of how to behave in certain circumstances, based on an individual's understanding of social structures.

Action is the visible behaviour which actors are able to adjust to the actions of others, as these actors have the abilities to interpret its symbolic meaning (Goffman, 1958). Outcomes, on the other hand, may be intended or unintended, and the focus

may be on both external and internal frameworks. Importantly, the agent considered (the agent-in-focus) draws not just on his or her own internal framework (knowledge of his or her social setting), but on their knowledge of the internal structures of other agents (thus what agent X thinks agent Y ‘knows’).

### **3.6 Bourdieu and Habitus**

The concept of habitus occupies a vital position in Bourdieu’s massive *oeuvre*. As a starting point for this discussion the following is established:

*“The conditionings associated with a particular class of conditions of existence produce habitus, systems of durable, transposable dispositions, structured structures predisposed to function as structuring structures, that is, as principles which generate and organise practices and representations that can be objectively adapted to their outcomes without presupposing a conscious aiming at ends or an express mastery of the operations necessary in order to attain them. Objectively ‘regulated’ and ‘regular’ without being in any way the product of obedience to rules, they can be collectively orchestrated without being the product of the organising action of a conductor”* (Bourdieu, 1990, p. 53).

The above statement explored, reveals, first, an obvious link between patterns of thought and social situations. Certain types of social situations generate peculiar types of habitus. The habitus, however, comprises a set of principles, embodied and articulated in the hauteur of the aristocrat or the stance of the peasant. Instead of focusing on a specific contexts in which principles may be used, in much same way in which a similar set of principles is used across contexts and applied by simply transferring to diverse aspects of practice is emphasised (Bourdieu, 1986).

A factor vital in this application is the extent to which it is suitable for the particular rules of the game. Bourdieu is predominantly concerned about the emphasis on the practical mastery of the rules of the game, and following rules without their recognition. These rules arise from the ebb and flow of practices and they are intrinsic to the relationships that exist in a particular field. Bourdieu (1990, p. 50) refers to “an econ-

omy of practices, a reason immanent in practices, whose 'origin' lies neither in the 'decisions' of reason understood as rational calculation nor in the determinations of mechanisms external to and superior to the agents". However, the capability to use suitable strategies is largely dependent on the acquisition of generative principles that depend on an individual's position in society. Those from different social situations will seem to respond in a similar mode, due to the objective conditions of existence that they share (Bourdieu, 1990).

Earlier experiences are fundamental in defining future responses, since people tend to react to new experiences by integrating them into the generative principles acquired (Bourdieu, 1990). The emphasis on practice is undoubtedly attractive to those developing the concept of communities of practice (Wenger, 1999); however, there needs to be recognition for Bourdieu's assertion that habitus is prior to practice and regulates it.

This appears to create difficulties for conceptions that privilege the development of modes of operation through practice. If habitus is effortlessly acquired at an early stage and is resistant to change, as Bourdieu insists, then the problem is the relations between habitus and practice, instead of its creation through practice. Habitus is significant in considering building resistance to brand switching from an identity point of view.

### **3.7 Philosophical Roots of Identity Theory**

Identity theory did not introduce an entirely new concept to academic discourse. Burke and Stets (2009) confirm that it had its beginnings in two sets of ideas that emerged first. One set of ideas, symbolic interactionism, includes thoughts about what makes up identities and how they function. Historically, identity theory grew out



of symbolic interaction, particularly structural symbolic interaction, which is the focus of this study. Stryker (1980, 2002) traces the ideas of the symbolic interaction background of identity theory to the views of the nature of the self.

The other set of ideas from which identity theory stems is perceptual control theory as developed primarily by Powers (1973). This set of ideas concerns the nature of control systems and provides an understanding of “purpose” and “goals”, which underlie all living things

This research is founded on the first set of ideas from which identity theory originated. However, in looking at the ideas of symbolic interactionism, this study pays particular attention to the work of Mead (1934), Stryker (1980), James (1890), Cooley (1902) and Burke (1977). Below is a review of the variants of symbolic interactionism.

The term “symbolic interaction” was invented by Blumer (1962, 1969) based on the work of Mead to represent a perspective that focuses on the unique character of human interaction centred on the shared use of symbols. The concept can be used to represent objects and events even in situations where the objects and events are not present. Because Blumer’s work largely spelled out his interpretation of the work of George Herbert Mead, a review and the exposition of symbolic interaction is discussed by elaborating on the contributions of Mead, which constitute the central components of symbolic interaction out of which identity theory emerged.

The mind/self, according to Mead (1934), is embedded in society and developed through communication and interaction with others. He insists that the mind adaptively operates to relate the person to his or her environment. Mead sees behaviour

as continuously adjusting to the environment, using the mind's ability for selective attention and perceptions (Meltzer, 1972). An important aspect of this process is the mind's ability to reflexively recognise the self and treat the self as an object, much like any other object in the situation. This reflexivity of the mind/self is central to the symbolic interactionist perspective and identity theory.

This ability to recognise the self as an object allows the mind to think about and act on the self in the same way that the self can think about and act on any other part of the environment. For example, people may apply make-up to their faces, thus acting towards the self. Burke and Stets (2009) claim that perception and action are intertwined and related through a mind that has socially developed to respond, not just to the environment, but also to the relationship between the person and the environment, adjusting each to meet the needs, goals and desires of the person. This link between perception and action or behaviour is central to identity theory.

Mead's notion of the self as composed of an "I" and a "me" highlights the connection between perception and action as guided by the mind. According to Mead (1943), "Me" is a social entity, embodying the meanings, understandings and experiences of the community. In addition, "me" is an individual, knowing the needs of the self as well as the place of the self within the community. In this way "me" is a reflexive being, able to take the self into account as an object that is distinct from others, but as an object that has its definition and place in the community of others. Mead supports this view giving the baseball player as an example. He claims the actions of the baseball player are determined not only by the player's position in the team but also by the player's knowledge of all the various positions in the team and their relationship to one another within the team. In addition, for good interaction and game play,

the player must know the positions of the opposing team and the relationship among all the positions in both teams.

Mead (1934) suggests that the “I” and the “me” are phases of the self. The “I” initiates the act, and then comes under the direction, control and guidance of the “me”. He insists that this should not be understood as a series of steps, as the “I” is continuously acting, and the “me” is continuously perceiving and guiding in order for both to bring about and maintain the person in relationship to the environment, and to others in the situation.

Being part of a culture, one comes to learn the concepts, the categories and classifications, and the meanings and expressions that are used by others in the culture to understand the world. Stryker (1980, 2002) noted that behaviour is dependent on a named and classified world, and the names point to aspects of the environment which carry meaning in the form of expectations about those aspects of the environment that are shared with others.

A sign is a stimulus that calls up a response that is the same as, or similar to, the response previously evoked by some other stimulus. Signs may also refer to other signs (Burke and Stets, 2009). Meaning is the response to a stimulus, and meaning does not reside in objects. Meaning is a response to an object or stimulus and meaning acts as a further stimulus to action.

A symbol derives its meaning from social consensus and is arbitrary, varying from one culture to another. Different symbols may have the same meaning (e.g. “sun” and “sol”) or the same symbol may carry different meanings in different context (e.g. “sol” meaning the old French coin and “sol” meaning the sun as derived from Latin).

Symbols are relative to social groups and communities in which the same signs are interpreted in the same way by most persons. Therefore, meanings of symbols are socially defined and shared.

Central to the process of naming things is the idea of shared meaning which Mead (1934) suggests is made possible by imitations. Imitations, he says, are possible when one observes another's reaction or responses to some situational stimulus and that reaction has already been learned by the individual. When that stimulus, which calls forth the reaction in the other, also calls forth the same reaction in the observer, the observer sees the commonality and "understands" the other's reaction, since the observer is already familiar with the response. In this shared understanding of the commonality of responses to the stimulus lies the beginning of the symbol, which is known as a natural sign, or simply a sign. Understanding of the symbol is a common reaction to some stimulus in the environment. As examples, the change in colour of leaves is a sign of autumn, while the needle on the fuel gauge pointed close to the "E" is a sign of emptiness, and the need to refuel.

Mead (1934) offers a further understanding of this concept by considering when the source of the stimulus is the person rather than the environment, and that stimulus calls forth a reaction shared both by the person and another. He indicates that when the source of the stimulus is the person, we have a *conventional sign* or *symbol*, sometimes known as *significant symbol*. This is a stimulus produced by a person that leads to a common response in both oneself and the other. The nature of this common response is arrived at by social convention. Symbolic interaction has tended to focus primarily or even solely on symbols, since they form the basis of thought, communication and interaction.

Stryker (1980), considered to be one of the originators of identity theory, claims that a person has an identity or an “internalised positional designation” for each of the positions or roles the person holds in society. Thus, if a person has the position of a husband, he has a corresponding husband identity. Burke (1980) supports this view and indicates that these internalised designations are in the form of “meanings”. For instance, the husband identity is what it means to be a husband, as it is the content of how one sees oneself in that position.

Stryker (1980) presents a set of basic premises on which identity theory is based. He considered the structural aspects of the symbolic interaction framework in particular. These premises are built primarily on the ideas of Mead, and since they are central to identity theory, the major ones are elaborated upon below.

Stryker’s first assertion is that behaviour is premised on a named or classified world. He further explains that the names or class terms attached to aspects of the environment, both physical and social, carry meaning in the form of shared behavioural expectations socially generated through interactions. Out of social interactions with other individuals, a person acquires the ability to classify the objects he or she interacts with, and in that process also learns how to behave with reference to those objects (Stryker, 1980). This statement describes the basic symbolic character of the world, since it makes clear that the meanings pertain to both physical and social objects, and that people respond to those physical and social objects and their responses give them meanings. Stryker’s second premise indicates the way social structures fit into the structural symbolic paradigm:

*“Among the class terms learned in interaction are the symbols used to designate ‘positions’, which are the relatively stable, morphological components of social struc-*

*ture. These positions carry the shared behavioural expectations that are conventionally labelled 'roles' (Stryker 1980, 2002, p. 54).*

Roles such as teacher, judge or husband are not just constructed or created anew in each situation but exist in society, and people perceive them, react to and label them within society.

The third premise specifies that people in society name or label one another in terms of the positions they occupy such as teacher or judge. By this they invoke shared meanings and expectations with regard to one another's behaviour as a teacher or judge. The fourth proposition advocates that people using the reflexive aspect of the self also name themselves with respect to these positional designations. For example, not only do others name Mary as a teacher or Billy as a student, but Mary also names herself as a teacher and Billy calls himself a student. According to Stryker (1980, 2000), it is these labels and the expectations and meanings attached to them that become internalised as the parts of the self that we call identities. Hence, people become a part of the social structure, occupying and identifying with the structural positions that are named in premise two.

These self-labels define individuals in terms of their positions in society, and these positions in society are relational in the sense that they tie individuals together, as in the case of a father tied to a son or daughter, a teacher tied to a student, a boy tied to a girl. The meanings and expectations for each position are related to the meanings and expectations for other positions. This is consistent with Mead's example of the baseball team highlighted above. Each individual not only knows his or her own meaning and expectations but also knows the meanings and expectations of those of others in related positions. For example, this knowledge allows Billy to consider

Mary's role in formulating behaviours and meanings in the classroom, and in this way both teacher and student are able to interact with each other smoothly.

In a nutshell, Stryker has laid out the symbolic interaction underpinnings of identities as well as the way in which identities and their symbolic underpinnings are tied into the larger structural aspects of society in terms of the roles that people play. For the purpose of this study, this provides a solid foundation on which identity theory is built.

James (1890) makes two salient points that predate Mead and are important to identity theory. In addition to emphasising that people are social and that habit plays an important role in human behaviour beyond biology and instinct, James called attention to the complexity of the self with the recognition that people have multiple selves, as many different selves as there are different others that recognise the individual (James, 1890, p. 294)

Burke and Stets (2009) share this view and indicate that the structure of society is made of multiple positions that relate to one another: doctors, lawyers, truck drivers, teachers and students. James (1890) recognised that each person could occupy several positions, for instance being a teacher, a wife, a mother and a friend; thus they have multiple selves. Hence each position comes with its own meanings and expectations that are internalised as what is known as identity. James (1890) referred to these collectively as multiple selves.

The second point touched upon, which is important to identity theory, concerns his treatment of the feelings of self-esteem. James (1890, p. 310) argues that self-esteem is a function of both our achievements and our aspirations.

$$\text{Self-Esteem} = \frac{\text{successes}}{\text{pretensions}}$$

William James' formula for self-esteem adopted from Burke and Stets (2009)

According to James (1890), even if our achievements (success in the formula) are high, our self-esteem will be low if our aspirations (pretensions in the formula) are higher. Alternatively, even modest achievements can boost one's self-esteem if aspirations are more modest. His formula above indicates clearly that the consequences of what we do are relative to our goals. Hence our goals set the standard for measuring our accomplishments.

Cooley (1902) set forth a number of ideas that have come to be incorporated into the symbolic interaction perspective and into identity theory more specifically. His early recognition of the importance of sentiments or emotions arising out of the way the self operates in interaction with others was his main strength. He recognised the importance of the relationship between oneself and others as central to the origins of sentiments. As an example, when confronted with a mirror, people see themselves reflected in the reactions of others and these reactions are known as *reflected appraisals*. They constitute one of the main ways we come to understand who we are in identity theory.

In addition, Cooley (1902) recognised that people imagine that others respond to that reflected view of who they are, and have an emotional reaction such as pride or mortification to what they think others' reactions to them are. For instance, based on another's reaction, Tom might think that the other perceives him as weak and might



imagine the other is disappointed in him. He may therefore be upset by that imagined assessment.

Cooley (1902, p. 227) elaborates further on the emotional consequences of one's relationship to others in terms of having self-views confirmed and shared by others in the community. Cooley suggests that a person may become upset and bitter, or feel cut off and attempt to change things.

Burke (1977) observed in the context of symbolic interactionism that while the constructs of self, self-concept and identity are widely used in social psychology and sociology, their use in empirical research has been quite limited. He suggests that for research to catch up with theoretical development, a technique to measure identities in a satisfactory manner is required (Burke and Tully, 1977). He takes the position, often asserted but more frequently ignored than honoured, that the process of measurement must be based on a theoretical understanding of the phenomenon to be measured (Burke, 1977). Consequently, Burke considers the theoretical properties of the concept of roles/identities, and in so doing contributes much conceptual and theoretical interest to symbolic interactionism in general.

McCall and Simmons (1978) emphasised that roles/identities are sub-units of a multifaceted self. The term intends to emphasise the tie between components of the self and locations in the social structure. It is this tie between components of the self and social structure that Burke (1980) sees as the most important development of self-theory.

Developments in ideas about role/identities have produced a number of common conceptions. For example, identities are meanings attributed by a person to the self

as an object in a social situation or social role. Identities are relational and reflexive identities are reflexive. They operate indirectly, and are a source of motivation. Each of these conceptual properties of role/identities has measurement consequences.

Identities are relational in the sense that they are related to roles, and for two other key reasons. Identities are related to other identities, just as roles are defined by their relation to counter-roles. Therefore identity, as an internal component or a role, is defined in relation to counter-identities. Identities also relate to one another as they become organised into a salience hierarchy, since high-ranking identities are more likely to be invoked in situations rather than low-ranking identities. Furthermore, identities at the top of the salience hierarchy are used to organise and to order those that are lower. The implications for measurement are that identities cannot be measured in isolation from other identities

Mead (1934) and James (1980) always emphasise the reflexive character of self in symbolic interaction. Reflexivity is the feedback to the self of the consequences of the processes that are the self. Identities influence performances and performances are assessed by the self for their identity implications.

The conceptualisation of identities as operating indirectly is addressed by the issue of self as process or structure. The idea of self as undergoing constant change versus the idea of self as having temporal stability is central here. Burke proposes that an identity influences role performance through the construction of self-image, and that it is the self-image that directly influences performance. Identities change, but not as rapidly as images.

The final conceptual property of role identities reviewed by Burke is that they are sources of motivation as indicated by Foote (1951). Identities motivate through defining behaviour. The classification of social objects including the self and others invokes shared expectations for behaviour; that is, meanings have implications for actions. Burke offers a series of refinements of this idea by suggesting that if identities as meanings are located in semantic space, and have action implications, then identities that are close to one another in that semantic space ought to have very similar action implications. Further, the acts and performances that have identity implications are also classified and located in that semantic space. According to Burke, the underlying dimensions of the semantic space used to locate identities and behaviours are defined by cultural standards. Only if this is so can there be the shared standards for assessing and identifying the individuals and behaviours that meaningful social interaction requires.

### **3.8 Effects of Identity Theory on Society and the ‘Self’**

Identity theory is principally a micro-sociological theory that sets out to explain individual role-related behaviour. The theory places major theoretical emphasis on a multifaceted and dynamic self that mediates the relationship between social structure and individual behaviour.

Identity theory (Stryker 1968, 1980, 1987; Stryker and Serpe, 1982; Burke, 1980; McCall and Simmons, 1978; Turner, 1978; Yeh et al., 2016; Stokburger-Sauer et al., 2012; Da Silveira, 2013; He et al., 2012) explains social behaviour in terms of the reciprocal relations between self and society. Consistently, Turner (2007) posits that identity theory seeks to explain why, where choice is possible, one role-related be-

havioural choice is made rather than another (Yeh et al., 2016; Stokburger-Sauer et al., 2012; Da Silveira, 2013; He et al., 2012).

Identity theory traces its roots to the writings of George Herbert Mead (1934) who presented a framework underwriting analyses of numerous sociological and social psychological issues. Mead's Framework asserted a formula: "Society shapes self, which in turn shapes social behaviour". Identity theory then began to attempt to specify and make researchable the concepts of "society" and "self" in Mead's Framework.

In line with the above, identity theory began with questions about the differential salience of identities in an individual's self-structures and the reasons why identity salience might change over time (Stryker, 1968; Wells and Stryker, 1988). These inquiries have resulted in the development of theory regarding ways in which people are tied to social structures and the consequences of these ties for their identities. Stryker and Burke (2000) claim that identity theory evolved along two different but closely related directions. Both are instantiations of a theoretical and research programme termed "*structural symbolic interactionism*" (Stryker, 1980), which aims to understand and explain how social structures affect self and how self affects social behaviours.

Historically, identity theory grew out of Symbolic Interaction (SI), particularly structural symbolic interaction (Stryker, 1980). Specifically, structural symbolic interaction is a version of symbolic interaction that stands in stark contrast to the traditional approach to symbolic interactions. Both versions of symbolic interactions have the same intellectual heritage by drawing on the seminal work of the pragmatic philosopher George Herbert Mead (1934) and earlier intellectuals such as William James

(1890) and Charles Horton Cooley (1902). Herbert Blumer (1969) coined the term “symbolic interactionism”, and his ideas led to the development of what we refer to as traditional symbolic interaction.

The first aspect (structural symbolic interaction) concentrates on examining how social structures affect the structure of self and how the structure of the self influences social behaviour. The second of his ideas concentrates on the internal dynamics of self-processes as these affects social behaviour.

Identity theory is strongly associated with the symbolic interactionist view which holds that society affects social behaviour through its influence on self (Mead, 1934; Blumer, 1969). Identity theory, however, rejects the symbolic interactionist view of society as a "relatively undifferentiated, co-operative whole", arguing instead that society is "complexly differentiated but nevertheless organised" (Stryker and Serpe, 1982, p. 206). This vision of society forms the basis for the central proposition on which identity theory is predicated: that as a reflection of society, the self should be regarded as a multifaceted and organised construct. Identity theorists refer to the multiple components of self as identities (or, more specifically, role identities). The notions of identity salience and commitment are used in turn to account for the impact of role identities on social behaviour.

Although identity theory was originally formulated by Stryker (Stryker, 1968, 1980, 1987; Stryker and Serpe, 1982), the term is now used more widely to refer to related theoretical work that acknowledges links between a multifaceted notion of self and the wider social structure (Burke, 1980; McCall and Simmons, 1978; Turner, 1978). This wider perspective, although still clearly grounded in symbolic interactionism, is not homogeneous. There are differences in emphasis and interpretation. Stryker, for

instance, views identities as more stable than some other identity theorists, and he tends to place less emphasis on the key symbolic interactionist mechanism of "taking the role of the other".

In general, identity theory is perceived as the foundation of a relatively huge body of micro-sociological literature concerned with predicting role-related behaviour (Simon, 1992; Thoits, 1991). Accordingly, identity theorists have tended to focus on the individualistic consequences of identity-related processes (Rosenberg, 1981).

### **3.8.1 Role Identities**

Symbolic interactionism acknowledges the self as a product of social interaction (Mead 1934; Cooley, 1902), in that individuals come to understand who they are through their interactions with others. From this perspective, a core mechanism is that of "taking the role of the other". Since people tend to interact in groups, it is perhaps not surprising that they may have as many distinct selves as there are distinct groups whose opinions matter to them (James, 1890, 1950). These two ideas come together in identity theory, which sees the self not as an independent psychological entity but as a multi-layered social construct that develops from people's roles in society. These differences in self-concepts are due to the different roles that people occupy.

Stryker proposed that we have distinct components of self, called role identities, for each of the role positions in society that we occupy (Stryker, 1968, 1980; Burke, 1980; Stryker and Serpe, 1982). For example, a person's role identities could comprise a mother, daughter, wife and career woman (such as a lecturer). Role identities are self-conceptions, self-referent cognitions, or self-definitions which individuals relate to themselves as a result of structural role positions they may occupy, and

through a process of labelling or self-definition as a member of a particular social category (Burke, 1980; Thoits, 1991).

Role identities offer meaning for the self, not merely due to the fact that they make references to concrete role specifications, but also because they distinguish roles from relevant complementary or counter-roles (Lindesmith and Strauss, 1956). For instance, a specific role that a mother takes on has a correlation with the role of a father. A doctor's role similarly has connections with that of a nurse (White and Burke, 1987). Burke and Reitzes (1981) observe that, ultimately, it is through social interactions that identities actually acquire self-meaning. In this sense, they are reflexive. Others respond to a person in terms of his or her role identities. These responses, in turn, form the basis for developing a sense of self-meaning and self-definition.

Identity is the pivotal concept linking social structure with individual action. Thus the prediction of behaviour requires an analysis of the relationship between self and social structure. While society provides roles that are the basis of identity and self, the self is also an "active creator of social behaviour" (Stryker, 1980, p. 385).

According to Callero (1985, p. 205), role identities, by definition, imply action. From an identity theory perspective, a role is a set of expectations prescribing behaviour that is considered appropriate by others (Simon, 1992). Callero (1985) posits that the satisfactory enactment of roles not only confirms and validates a person's status as a role member. The viewpoint that one is playing a role satisfactorily must enhance feelings of self-esteem, whereas the notion of poor role performance may cause doubts about one's self-worth, and perhaps create symptoms of psychological agony (Thoits, 1991; Stryker and Serpe, 1982). Distress may arise if feedback from others

in the form of reflected appraisals or perceptions of the self, suggested by others' behaviour, is perceived to be incongruent with one's identity. According to Burke (1980, 1991), identities act as cybernetic control systems. They bring into play a dissonance reduction mechanism, whereby people modify their behaviour to achieve a match with their internalised identity standards. This process in turn reduces distress.

Identity theorists lay emphasis on the self-defining roles which are occupied in society, instead of the wide range of different social traits that may be ascribed to self. Stryker (1987) is of the view that these latter attributes, which might include gender, race, ethnicity, and so forth, often function as master statuses, because in many contexts they dominate all other characteristics of the person. They are structurally based attributes that reflect the features of the social structure in which people's role identities are embedded. However, because they do not carry specific sets of behavioural expectations, they are not separate components of self (Thoits, 1991).

Nevertheless, social attributes have an indirect impact on self (Yeh et al., 2016; Stokburger-Sauer et al., 2012; Da Silveira, 2013; He et al., 2012) through their effect on the role positions people hold, the relative importance of their role identities, and the nature of their interactions with others (Parker and Ward, 2000).

### **3.8.2 Identity Salience**

Stryker and Burke (2000) defined identity salience as the possibility that an identity may be invoked across a variety of conditions or otherwise across individuals in a given circumstance. Identity theory links role identities to behavioural and affective outcomes, and acknowledges that some identities have more self-relevance than others. Role identities are organised hierarchically in the self-concept with regard to



the probability that they will form the basis for action. Those positioned near the top of the hierarchy are more likely to be invoked in a particular situation, and hence are more self-defining than those near the bottom (McCall and Simmons, 1978; Stryker, 1968).

As defined above by Stryker and Burke (2000), identity salience is conceptualised and operationalised as the likelihood that the identity will be invoked in diverse situations. In contrast, other concepts (such as role-person merger) focus more strongly on the person's perception of the importance or significance of the identity relative to other identities (Nuttbrock and Freudiger, 1991). The direct and explicit implication of this behavioural notion of identity salience is that identities positioned higher in the salience hierarchy are tied more closely to behaviour. Thus people with the same role identities may behave differently in a given context because of differences in identity salience (e.g. Callero, 1985; Thoits, 1991). For example, one person may work over the weekend, while another may spend time with the children, although both may have a "parent" role identity. The difference in behaviour is due to differences in identity salience (Serpe, 1987).

Nuttbrock and Freudiger (1991) insist that people may also enact role-congruent behaviours even in situations that are not role-relevant. For instance, people with salient "parent" identity may, at work, engage inappropriately in behaviours related to their roles as parents. Although identity theory specifies clearly the hypothesis that salient identities engender role-congruent behaviour, Stryker (1968) acknowledges that, in some situations, contextual demands may be so strong that the choice of behaviour will be determined solely by the nature of the situation, rather than by identity salience. As well as affecting behaviour, salient identities have affective outcomes.

Their enactment should exert more influence than the identities lower in the hierarchy over a person's sense of self-meaning, feeling of self-worth, and level of psychological well-being (Callero, 1985; Thoits, 1991). This idea can be traced back to James' (1980) early view that role-congruent behaviours have self-evaluative implications which vary according to the relative importance of the different components of self.

In addition to behavioural and affective outcomes, identity salience influences people's relationships, particularly their perceptions and evaluations of others (Callero, 1985; McCall and Simmons, 1978; Yeh et al., 2016; Stokburger-Sauer et al., 2012; Da Silveira, 2013; He et al., 2012). Although not extensively developed, one proposal is that salient identities are associated with positive evaluations of others who occupy similar roles. A fully explored proposal regarding the number and relevance of social relationships premised on a particular role identity may influence the salience of that identity. This idea is captured by the notion of commitment.

### **3.8.3 Commitment**

Identity theory proposes that the salience of a particular identity will be determined by the person's commitment to that role. Commitment, defined as the "degree to which the individual's relationships to particular others are dependent on being a given kind of person" reflects the extent to which important significant others are judged to want the person to occupy a particular role position (Stryker and Stratham, 1985, p. 345). Commitment to a particular role identity is high if people perceive that many of their important social relationships are predicated on their occupancy of that role.

The consequence of vacating such a role is loss of a social network that is psychologically important, for example for the self-concept and for self-esteem (Hoelter, 1983).

Stryker (1980) identified two types of commitment. First, interactional commitment, reflecting the number of roles associated with a particular identity (the extensivity of commitment) and second, affective commitment, referring to the importance of the relationships associated with the identity; in other words, the level of effect associated with the potential loss of these social relationships (the intensivity of commitment).

The more strongly committed a person is to an identity in terms of both interactional and affective commitment, the higher the level of identity salience will be. In terms of network relationships, the more fully a person's important social relationships are based on occupancy of a particular identity, in comparison with other identities, the more salient that identity will be. Similarly, the larger the number of persons included in such a set of social relationships, the more salient the identity (Stryker and Serpe, 1982).

Callero (1985) is of the view that salience of a donor identity indicates the rate at which others donate. Again he presents evidence that commitment to others in the blood donor community affects the salience of the identity of such donors. Nuttbrock and Freudiger (1991) proved that a mother's identity salience among new mothers reveals the extent to which they accept the burdens of motherhood and making sacrifices for their child. Stryker and Serpe (1982) establish that the salience of religious identities foretells the amount of time spent in religious events, and the salience of

religious identities is projected by commitment to role relationships centred on religion.

By acknowledging the impact of social networks on people's self-concepts (Yeh et al., 2016; Stokburger-Sauer et al., 2012; Da Silveira, 2013; He et al., 2012), identity theory links the wider social structure, in terms of role positions, and the person's more intimate social networks (through levels of commitment to different role positions) to the self-concept. It also connects social structure to the development and maintenance of social relationships (Serpe, 1987).

### **3.9 Marketing Implications of Identity Theory on Brands**

As indicated above, identity theory (Stryker, 1968) lays emphasis on the social roles of individuals in several social settings. Hence, marketing research based on identity theory concentrates on how consumers perceive a brand as “me” or “not me” (Kliene et al., 1995) and how they behave in agreement with the most salient identity (Arnet, German and Hunt, 2003; Bolton and Reed, 2004; Oyserman, 2009).

Burke and Stets (2009) affirm that one of the early views of identity that grew out of the symbolic interaction framework, with its emphasis on symbols and meanings, is that identities provide “meaning” for individuals’ lives. They stress that a life without meaning has no purpose, no structure, and no framework. Consistent with this view, Thoits (1983, 1986) suggests that identities provide a sense of purpose and meaning in life, defining who we are, as well as why we behave in specified ways in society, integrating us with the actions and expectations of others. Identities thus increase self-esteem and reduce depression and anxiety (Thoits, 1983).

Consumer research from an identity point of view has recognised for some time that people consume in many ways that are consistent with their sense of self (Levy, 1959; Sirgy, 1982). Academics agree that successful brands are designed to satisfy not only the functional needs of consumers but also their symbolic needs (Kapferer, 1997; Yeh et al., 2016; Stokburger-Sauer et al., 2012; Da Silveira, 2013; He et al., 2012; O’Keeffe, Ozuem et al., 2016; Ozuem, Thomas and Lancaster, 2016; Giovanisa and Athanasopouloub, 2018).

Research finds that consumers often use the “self” as a reference category for understanding their surroundings (Rogers, Kuiper and Kirker, 1977; He et al., 2012), especially when they judge other people (Otten and Wentura, 2001). Customers can develop strong relationships with the unique identities of brands for their unique identity (Fournier, 1998; Yeh et al., 2016; Stokburger-Sauer et al., 2012; Da Silveira, 2013; He et al., 2012; O’Keeffe, Ozuem et al., 2016; Ozuem, Thomas and Lancaster, 2016; Giovanisa and Athanasopouloub, 2018). In support of Fournier’s view, Tian et al. (2001) insist that individuals have different levels of motivation and needs for distinctiveness in their identities Yeh et al., 2016).

Identity theory is closely linked to the self-concept; both examine the interrelation between the self and social entities (Belk, 1988, Sirgy, 1982; He et al., 2012). These theories have many similar concepts that have been introduced into the marketing literature. Hence this study draws from such theory to conceptualise CBI (Yeh et al., 2016; Stokburger-Sauer et al., 2012; Lam et al., 2013), and in doing so, a brand is perceived as a relationship partner that is significant to the private self. Thus the individual customer uses the brand to define who they are (including the social self),

such that these customers consider themselves to be part of a group of customers who identify with a particular brand.

Drawing from the above, it can be said that shoppers re-purchase specific brands that carry meanings for them, as opposed to just offering product utility. Hence, it can be argued that particular brands that possess distinctive identities have the potential to win the attention of consumers and, ultimately, their loyalty. For that reason, brand managers need to create and sustain a clearer and consistent identity, to ensure brands serve stable references for consumers (Aaker, 1996; Kapferer, 2008; Chaplin and Roedder, 2005; O'Keefe et al., 2016). This supports a widely-held belief that a stable brand identity may assist firms to adapt to market variations (Collins and Porras, 1994). Practically, and consistent with this principle, firms strive to stabilise the identity of their brands on a long term. For example, Nestlé currently re-examines its brands' identities every four years.

### **3.9.1 Impact of Brands on Consumers' Identities**

Possessions are parts or extensions of the individual (Sartre, 1943), and therefore contribute to the construction of the self-concept, and to the definition, expression and reinforcement of self-identity (Belk, 1988). Researchers in consumer research have extended this finding to brands (Escalas and Bettman, 2003, 2005; Fournier, 1998). Brands act through the activities of the managers who administer them. In accepting the behavioural significance of marketing actions, one accepts the legitimacy of the brand as a contributing relationship partner (Fournier, 1998). Brands help consumers create and define their self-identities (McCracken, 1989). For example, Schau and Gilly (2003) show how consumers use brands to create cyber self-representations. Fournier (1998) argues that brands contribute to the exploration and

resolution of identity issues. Consumer research on reference groups establishes congruency between membership of that group and brand use (Bearden and Etzel, 1982). Consumers also use brand associations to build the self and to communicate the self-concept to people they relate to or have connection with the brand, appropriating the meaning and the identity of brands as they construct their self-identities (Escalas and Bettman, 2005). Additionally, they provide knowledge on how consumers dynamically rework and improve the symbolic meanings of brands to reflect their personal and social conditions and promote their identity and lifestyle goals (Arnould and Thompson, 2005).

### **3.9.2 Impact of Consumers' Identities on Brands**

Fournier (1998) creates a structure to better understand the relationships consumers forge with the brands they associate with. He further presents brands and consumers as reciprocating relationship partners. One of the conditions that qualify relationships in the interpersonal domain (Hinde, 1995) is the fact that relationships are process-phenomena, whereby the partners must collectively affect, define, and redefine the relationship. Aaker (1997; He et al., 2012; Yeh et al., 2016; O'Keefe et al., 2016) maintains that consumers transfer to the brand the personality traits of the individuals they identify with. That is, references to the impact of consumer identities on brands link to the reciprocal role of the brand in the consumer–brand relationship. At a group level of analysis, symbolic characteristics of reference groups influence brand meaning (Escalas and Bettman, 2005). A further contribution to the influence of consumer identities on brands stems from the fact that consumers become both brand identity seekers and brand identity makers (Arnould and Thompson, 2005; Holt, 2004; Schau and Gilly, 2003). For instance, Holt (2004) shows how legendary brands such as Budweiser and Harley Davidson relate their brand identities to con-

sumers' identities (Arnould and Thompson, 2005). They view consumers as brand culture and brand meaning producers (Arnould and Thompson, 2005; Brown et al., 2003; Grayson and Martinec, 2004). Consumers create cultural worlds through the search for common preferences in consumption (Cova, 1997; Kozinets, 2002). In effect these cultural worlds in turn impact on the identities of brands.

### **3.10 Conclusion**

This chapter initially provided an in-depth explanation of the theoretical context upon which this study is undertaken. Various definitions of 'identity' are explored from social and personal perspectives. Then, a review of the conceptualisation of identity, including an examination of Goffman's contribution to the conceptualisation of identity, was also conducted.

The historical roots of identity theory in symbolic interactionist thought were also expounded, based on major ideas of early and contemporary philosophers, to offer a deeper understanding of the background of identity theory. Finally, the chapter concludes by exploring the marketing implications of identity theory for brands, the impact of brands on consumers' identities and the impact of consumers' identities on brands.



## **CHAPTER FOUR**

### **CONCEPTUAL FRAMEWORK**

#### **4.1 Introduction**

Literature on brand loyalty and identity theory provides a foundation for this chapter as it opens with a review of both theories in relation to the research problem. The chapter then provides a critical review of Lam et al.'s (2013) CBI model and the rationale behind the decision to adopt and advance it in this study. The chapter concludes by highlighting the reasons and justifications for this theoretical choice to further develop the CBI model into a graphical presentation of an enhanced conceptual framework.

#### **4.2 Consumer–Brand Identification (CBI) Model**

Marketing research based on identity theory focuses on how individual consumers behave in agreement with the most salient identity (i.e. highest in the hierarchy), because it provides the most meaning for the self (Arnett, German and Hunt, 2003; Reed, 2002). This stream of research also frames customer–brand relationship in the light of what is “me” and what is “not me” (Kleine, Kleine and Allen, 1995). Drawing on Bhattacharya, Rao and Glynn's (1995) research, this study posits that customers who identify with a brand are likely to be loyal to the brand, but all brand-loyal customers need not identify with the brand. This view necessitates a detailed analysis of the brand loyalty literature to ascertain which perspective is preferred in a competitive market in order to establish and consolidate consumer loyalty.

The current study examines two major limitations in brand loyalty. The first is that the sustainability of brand loyalty predictors refers to resisting both time and market disruptions (Lam et al., 2010, 2013). Conversely, the brand loyalty literature largely concentrates brand performance within normal market situations (Keller and Lehmann, 2006). However, the business environment has evolved into a much multifaceted, innovative and global market where disruptions become more prevalent. The second limitation in brand loyalty is that the perceived value of a brand is conceptualised and operationalised as a functional utilitarian value. As is prevalent in the brand loyalty literature, this does not capture other non-utilitarian factors, such as socio-psychological benefits, which serve as motivation for customers to remain loyal (e.g. Bagozzi, 1975; Gardner and Levy, 1955; Holbrook and Corfman, 1985; Richins, 1994; Sheth et al., 1991; Solomon, 1983; Sweeney and Soutar, 2001; He et al., 2012; Yeh et al., 2016).

The extant literature on brand loyalty as explored in Chapter Two looked at consumer loyalty from two perspectives. Broadly, there are two schools of thought underlining the concept of brand loyalty: behavioural loyalty and attitudinal loyalty (e.g. Bandyopadhyay and Martell, 2007; Dick and Basu, 1994; Ringberg and Gupta, 2003). Preliminary marketing research alleged consumer loyalty to be behavioural, evaluating the concept as behaviour involving the repeat purchase of specific brands, measured by the sequence or the buying pattern, as a percentage of total purchases (Hallowell, 1996; Homburg and Giering, 2001; Yi, 1990). Nam et al. (2011) confirmed this perception by affirming that loyalty has traditionally been conceived as a behavioural construct relating to intentions towards repeat purchase. Simply put, Nam et al. (2011) refer to behavioural loyalty as the frequency of repeat purchases, in

agreement with Ehrenberg et al. (1990) who suggest that repeat purchasing can capture the loyalty of a consumer towards the brand of interest.

Kuusik and Varblane (2009) identify three sub-segmented reasons for behaviourally loyal customers. These are those customers who are: (i) forced to be loyal (e.g. by monopoly or high exit costs), (ii) loyal due to inertia, and (iii) functionally loyal. Oliver (1999) attaches the concept of inert loyalty to routine purchases, so that a sense of satisfaction is not experienced and it becomes a task. From a marketing perspective, it suggests that as long as there are no specific “triggers” to compel behaviourally loyal customers to change providers, they will remain passively loyal (Roos, 1999).

Day (1969) criticised this one-dimensional view as behaviourally centred, and therefore not useful to distinguish true loyalty from “spurious loyalty”. Since then, most researchers acknowledge the essence of merging attitudinal and behavioural components (Berné et al., 2001; Dick and Basu, 1994; Jacoby and Kyner, 1973; Oliver, 1997). Similarly, Day’s criticism, above, was emphasised by Uncles and Laurent (1997) as they posited that by classifying these behavioural observations as forms of loyalty, customers who are emotionally attached to products and services are overlooked. This can lead to overestimations of a company’s loyal customer base and the stability of their portfolio (Crouch et al., 2004). Significantly, Dick and Basu (1994) contended that a favourable attitude and repeat purchase were ideal to define loyalty, by viewing loyalty as an attitude-behaviour relationship in their framework

Attitudinal loyalty, on the other hand, can be defined as capturing the emotional and cognitive components of brand loyalty (Kumar and Shah, 2004). Oliver (1999) aligns his description with this belief by defining loyalty as a deeply held commitment to re-buy or re-patronise preferred products or services consistently in future. This is de-

spite situational influences and marketing efforts having the potential to cause switching behaviour. Brand commitment, therefore, is when a consumer enters into a covenant with a brand choice within a product category (Lastovicka and Gardner, 1977). Therefore brand commitment is synonymous with attitudinal loyalty (e.g. Chaudhuri and Holbrook, 2001). The issue of commitment is discussed in more detail in the next chapter.

Attitudinal loyalty represents a more long-term and emotional commitment to an organisation (Bennett and Rundle-Thiele, 2002; Shankar et al., 2003), which is why attitudinal loyalty is referred to as “emotional loyalty” that is regarded as being “much stronger and longer lasting” (Hofmeyr and Rice, 2000). Such concepts have been compared with marriage (Albert and Merunka, 2013; Dwyer et al., 1987). Consistent with the above, attitudinal loyalty denotes the psychological commitment consumers show in the purchase act and, for instance, intentions to repurchase and recommend without necessarily taking repeat purchase behaviour into account (Jacoby, 1971).

Drawing from the above, this study proposes a conceptual framework (CBI) to examine the issue of brand switching in the Smartphone industry by making reference to the framework developed in Lam et al. (2013). Following Lam et al. (2013), CBI is thus defined for the purposes of this study as “a consumer’s psychological state of perceiving, feeling, and valuing his or her belongingness with a brand” (p. 235). Although social identity theory and identity theory have evolved across the two fields of social psychology and sociology, both theories have several concepts in common and have as such been introduced into the marketing literature (Reed, 2002). Moreover, these theories are related, closely to the self-concept literature. Both examine the association between the self and society (Sirgy, 1982; Belk, 1988). Most relevant

to this research are identification and identity-congruent behaviour. Identity represents the subjective component of a role and identities are organised hierarchically. Identity theory is more concerned with individual behaviours and the private self (Triandis, 1989).

Taking a cognition-based approach, this study proposes that customers identify with brands to satisfy one or more self-definitional needs (Lam et al., 2013; Ahearne, Bhattacharya and Gruen, 2005; Bagozzi et al., 2008; Bhattacharya and Sen, 2003; Einwiller et al., 2006). The current study seeks to investigate consumer identification with brands in the Smartphone industry through an empirical study across Ghana and the United Kingdom. Specifically, the Smartphone industry was chosen as the product category for this study because it represents a context in which brand switching is most likely to occur due to multiple alternatives and short inter-purchase frequencies (Campo et al., 2000; Goldsmith, 2000). Notably, the market for Smartphones is probably the most dynamic of any in the world, considering the degree and rate of change in technology. The extent of product innovation disrupting the Smartphone market is staggering (Azize Sahin et al., 2013; Cecere et al., 2015).

Analysis of brand identification, however, has developed from its underpinning in social identity theory (SIT) and self-categorisation theory (SCT), (Tajfel, 1978, 1982). These theories indicate that consumers try to attain a social identity that communicates to their own identity, which assimilates to that of members within a group to which they belong. As conceptualised in SIT, identification is defined as the psychological state that has multidimensional perspectives, namely affective, cognitive and evaluative (Fournier, 1998; Lam et al., 2013). However, it has also been defined in the academic literature as congruence of self-image among consumers and brands

(Hughes and Ahearne, 2010; Doavan et al., 2006; Kressmann et al., 2006) or the involvement of a consumer in a brand (Pritchard et al., 1999). Individuals use brands to create and communicate their self-concept (Chaplin and John, 2005). Consumers identify with brands with which they share similar personality traits and values, given the importance of the symbolic nature of brands. Consumers create their social identity based on their brand choice (Bagozzi and Dholakia, 2006; Carlson et al., 2008; Dholakia et al., 2004).

CBI denotes the relationship developed between the brand and consumers, often confused conceptually with other relational elements, such as (a) connection between brand and self, (b) love and passion for the brand, (c) commitment to the brand, (d) a close relationship with the brand, (f) interdependence with the brand and (f) the brand as a partner (Fournier, 1998). Identifying with a preferred brand has psychological benefits, including strengthening the consumers' self-esteem (Wann and Branscombe, 1995), involving behaviours like loyalty, cross-buying, up-buying and word-of-mouth (Ahearne et al., 2005; Bhattacharya and Sen, 2003). It also implies a willingness to pay a higher price (Homburg et al., 2009), and resistance to negative information about the company (Bhattacharya and Sen, 2003).

Part of the most important antecedents of brand identification literature is congruence between the consumer's and the brand's values (Bhattacharya and Sen, 2003; Lam et al., 2013; Tuškej et al., 2011) and satisfaction with the brand (Kuenzel and Halliday, 2008). Lam et al. (2013) summarise the antecedents of the consumer's identification with the manufacturer's brand using three variables: instrumental, symbolic, and consumer trait variables. Specifically, for the technology market, and for a leading brand manufacturer at the introductory stage, their study considers perceived

quality as an instrumental driver. It accepts congruence between the consumer's image and that of the brand (self-brand congruity) to be a symbolic driver, and it assumes that satisfaction with the brand is key to constructing long-term relationships between the brand and the consumer (Oliver, 1980).

The CBI model developed by Lam et al. (2013) is adapted and advanced for this study to support the antecedents of consumer identification in the Smartphone industry at a more matured and competitive stage, whereas the original model by Lam et al. (2013) was specifically designed for the technology market, and for a leading Smartphone brand at the introductory stage. For the purpose of this study, the components of the models can be summarised using these predictors: instrumental drivers, symbolic drivers, and satisfaction drivers with the brand. In the specific context of the Smartphone industry, however, this study considers perceived quality as a characteristic of instrumental drivers, because these are generally under the control of the manufacturers. Associations with Smartphones are conceived as symbolic variables and brand advocacy, whereas resilience and loyalty are measured as satisfaction variables. The model developed by Lam et al. (2013) constitutes the reference and starting point of this study, and it is adapted to the Smartphone industry at a mature and competitive stage.

The three focal drivers of consumer identification with the Smartphone sector are categorised and explained further, using three kinds of variables. First, perceived quality is considered an instrumental driver of Smartphones because this is generally under the control of manufacturers. Perceived value is used because it is the main characteristic recognised in these brands (Kara et al., 2009). Perceived quality is defined as a consumer's judgment about the superiority or excellence of a product

(Zeithaml, 1988), hence it represents an instrumental driver of CBI (Katz, 1960; Mittal, 2006; Swan and Combs, 1976; Keller, 1993). This driver is referred to as “functional”.

Second, associations with Smartphones (which provide self-brand congruity) are conceived as symbolic drivers since they are reasonably controlled by managers, through marketing communications and brand positioning. The self-brand congruity is a fundamental antecedent of identification (Dimitriadis and Papista, 2011; Kuenzel and Halliday, 2010; Lam et al., 2013). The buyer with a more positive attitude to Smartphones will see him/herself as a smart shopper (Garretson et al., 2002; Martínez and Montaner, 2008). Smartphones, characterised by their prices and their quality, are similar to other manufactured brands (Apelbaum et al., 2003) and are thus congruent with the self-image of their consumers as smart shoppers.

Finally, this study introduces satisfaction as a determining variable in consumer identification with these brands (Bhattacharya et al., 1995; Kuenzel and Halliday, 2008). Satisfaction with the brand over a period of time arises from the results of the subjective evaluation of preferred brand experience or consumption, especially where the brand exceeds expectations. A common aspect existent in most definitions of satisfaction is the perception of comparison between expectations and results (Gómez et al., 2011). Satisfaction with the brand is key to constructing relationships between the brand and the consumer (Oliver, 1980). This is a vital strategic concept in marketing, as it seeks to generate an explicit connection between the processes of purchasing and consumption and the post-purchase phenomenon (Hunt, 1983). A graphical representation of Lam et al.’s (2013) and the CBI model proposed for this study is shown below in Figures 4.1 and 4.2 respectively.



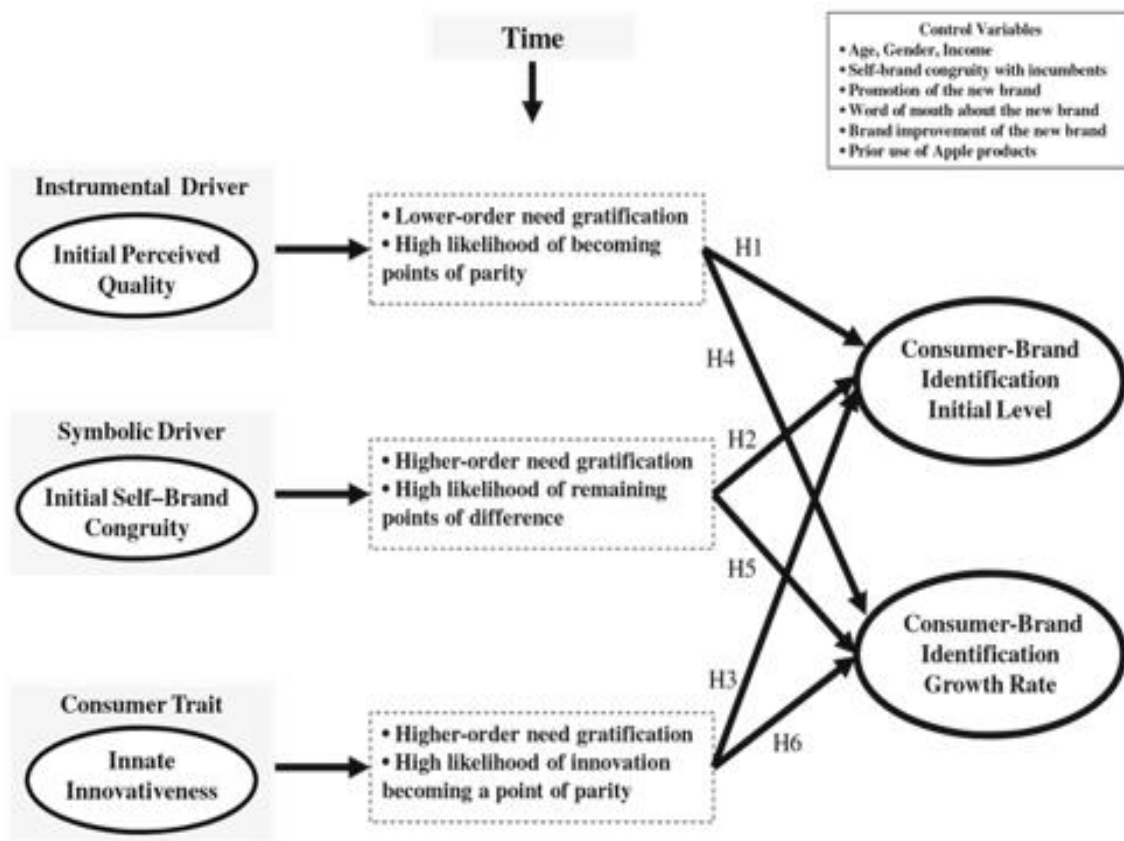


Figure 4.1: Customer–Brand Identification (CBI) Model, adopted from Lam et al. (2013)

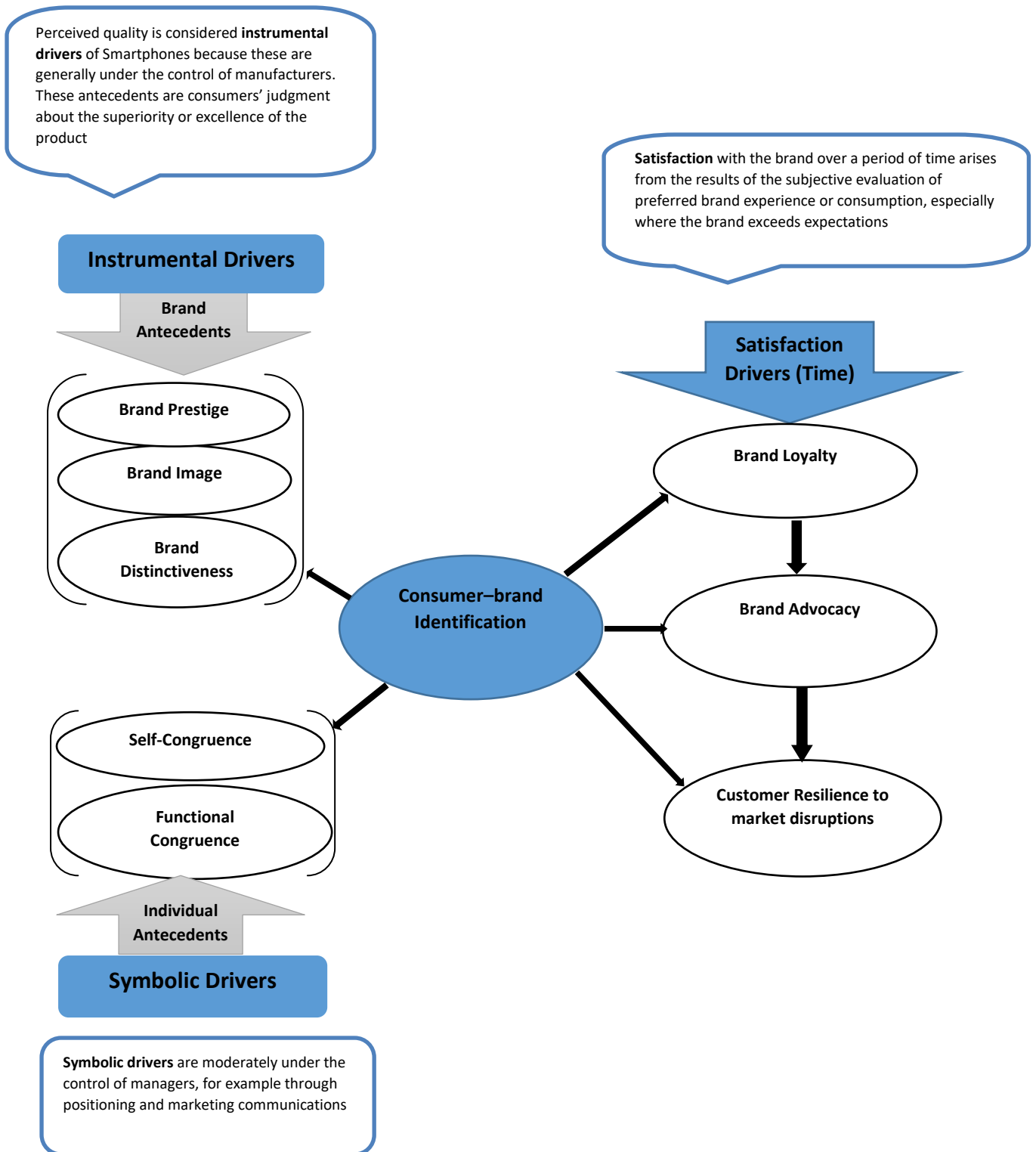


Figure 4.2: Customer-Brand Identification (CBI) Model

The current study resonates with the ontological position of the CBI model developed by Lam et al. (2013). They hold the core assumption that realities are not objective, and there can be no claim of absolute truth (Maxwell, 2005). However, this study opposes their epistemological orientation. They adopt a quantitative approach to develop a hypothesis to test the CBI model using longitudinal survey data based on responses from 635 consumers. They apply Hierarchical Multivariate Linear Modelling (HMLM) to test the hypotheses they developed. On the other hand, the current study maintains a constructivist perspective to examine participants' understanding of what constitutes satisfaction. It explores the effects of identity on customer loyalty particularly in the Smartphone industry during market disruptions. Constructivists believe that there is no ultimate knowledge, rather it is contextually created by both the object and subject of the inquiry (Ozuem, 2004), and hence the epistemological position of this study has been framed and reframed based on participants' experiences.

The current study from a constructivist standpoint seeks to derive meaning of the world of human experience in which "reality is socially constructed" (Mertens, 2005, p. 5). Therefore knowledge and, for that matter, reality are dependent upon human practices and experiences, which can be elicited by means of interactions involving the investigator and investigated. This study gathered data from users of Smartphones through semi-structured survey questionnaires and interviews in the UK and Ghana. Grounded theory was then used to analyse data by building open codes, axial coding and finally selective coding. This approach was taken to enhance theoretical understanding of the CBI model which has been proposed and designed for this study, in terms of what constitutes satisfaction to mitigate brand switching during market disruptions in the Smartphone market.

Consequently, constructivism rejects objectivism and a single truth as proposed in positivism and post-positivism. Bettis and Gregson (2001) maintain that researchers and those researched, or the phenomena studied, engage in dynamic interactions that create the meaning of findings. This makes the investigator and the object of investigation interactively linked, creating the findings as the research proceeds. This study seeks to find meanings to social phenomena, and specifically in terms of brand switching. Drawing on the conventional view of possessions as the extended self (Gardner and Levy, 1955; Belk 1988), this study draws from identity theory to propose that consumers might develop customer–brand identity or a trust that they share the same self-definitional attributes with a brand. The current study extends this logic to investigate switching behaviours, hence the use of a constructivist paradigm for this research.

### **4.3 Conclusion**

This chapter introduced the background to the CBI model proposed for this study and its antecedents in the context of the Smartphone industry at its matured and competitive stage. The three focal drivers of CBI, namely perceived quality (the instrumental driver), brand association or self-brand congruity (the symbolic driver) and the satisfaction driver, were examined and explained. The chapter then provided a critical review of the Lam et al.'s (2013) CBI model, and explored the rationale behind the decision to adopt and advance it into a graphical presentation. The chapter finally highlights the reasons and justifications for the choice to further develop the CBI model for this study. The CBI model developed for this study also provides insights into how companies can leverage both functional and symbolic brand associations over time to achieve differential effects and, consequently, optimally allocate brand investments to drive loyalty.

# **CHAPTER FIVE**

## **RESEARCH METHODOLOGY**

### **5.1 Introduction**

This chapter presents the research methodology adopted for this research. It explains the explicit and implicit assumptions adopted by the researcher during the research process. The research methodology serves as the foundation upon which the research is developed. Creswell (2017) insists that in order to choose the appropriate methodology and methods for conducting research, the research needs to be positioned within an appropriate research paradigm and must be based on a methodology that is compatible with the research philosophy selected. Howell (2013) further suggests that methodology impacts on methods, and has considerable influence over what knowledge is considered to be, and the consequent outcomes of the investigation.

In light of the above, this study ontologically assumes the phenomenological position as a suitable lens to examine the nature of brand loyalty. It further explains the relationship between the philosophical assumption and paradigm of enquiry. A review of various paradigms of inquiry is presented and the constructivist paradigm, which this study considers appropriate, is chosen as an appropriate choice to underpin this research. In addition, the rationale for choosing grounded theory as a methodology for this thesis is discussed, and its fundamental principles are revealed. Finally, an overview of the data collection techniques and methods employed within a qualitative grounded theory methodological approach are discussed. The strengths and weaknesses and implications of using this approach are all discussed.

## **5.2 Research Paradigm**

The term paradigm is characterised in the classical thesis of Kuhn (2012) as the basic beliefs about what constitutes reality, what counts as knowledge, and what guides action in inquiry or research (Guba and Lincoln, 2011; Bettis and Gregson, 2001).

A discussion of the distinction between reality and knowledge offered by Howell (2013) indicates that reality is related to knowledge and can be absolutely separate from or a construction of the mind. Knowledge is an integration of our stock of explanations, and understanding of why reality and truth, and the theories that reflect this, are as they are. Knowledge involves interpretations of facts derived from data, as well as abstract comprehensions of phenomena.

Paradigms of inquiry deal with the philosophical issues underpinning qualitative research (Denzin and Lincoln, 2011). A paradigm determines how members of research communities view both the phenomena their particular community studies and the research methods that should be employed to study those phenomena (Donmoyer, 2008). It can also be said that a paradigm determines our perspective, and shapes our understanding of how things are connected (Henning et al., 2004; Nwanji and Howell, 2004). Denzin and Lincoln (2011) emphasised that a paradigm of inquiry can be identified across three aspects. Creswell (2017) argues that although these philosophical ideas are hidden in the research, they influence the research practice. These major philosophical ideas are outlined below.

## **5.3 Major Forms of Research Paradigms**

Research paradigms have been broadly divided into several different forms, depending on the researcher's philosophical thinking (Saunders et al., 2009). Howell (2013)

identified five main paradigms of inquiry for research: positivism, post-positivism, critical theory, constructivism, and participatory approaches. These paradigms are differentiated below on the basis of the three fundamental characteristics mentioned above: ontology, epistemology and methodology.

Positivism is mainly associated with natural sciences, “based on the rationalistic, empiricist philosophy that originated with Aristotle, Bacon, Locke, Comte and Kant” (Martens, 2005, p. 8). Cohen and Grace (2007) claim that the doctrine of positivism holds that all genuine knowledge is based on sense experience and can be advanced only by means of observation and experiments, hence the scientist is the observer of an objective reality. Positivists assume that an apprehendable reality exists, driven by immutable natural laws and mechanisms (Guba and Lincoln, 2011). Positivists seek one objective “truth” with verifiable patterns that can be predicted with certainty (Kim, 2003; Guba and Lincoln, 2011).

According to Guba and Lincoln (2011), the investigator and the investigated (object) are assumed to be independent entities, hence the investor is capable of studying the object without influencing it or being influenced by it. Researchers using the quantitative approach believe that all knowledge is scientific and credible and data is based on observable phenomena (Saunders et al., 2009).

Quantitative research, however, has been criticised for failing to recognise individual experiences and the interpretive ability of people to construct their own meanings and actions (Massey, 2003). The positivist paradigm is rigid, which renders it ineffective in understanding human actions. It does not serve a useful purpose in generating theories (Easterby-Smith et al., 2015).

Post-Positivism challenges positivism, and Popper identified a critical method of falsification and refutation (Howell, 2013). Positivism was denounced in the nineteenth century by Friedrich von Hayek and Karl Popper. In terms of post-positivism, according to Guba and Lincoln (2011), its ontology lies in critical realism; by this they hold the view that realism is presumed to be in existence yet poorly apprehendable. Cook and Campbell (1979) elaborate further that post-positivism is critical realism because of the posture of proponents who claim that reality needs to be exposed to a wider critical scrutiny to help apprehending reality thoroughly, and not with the aim of achieving perfection.

Both positivism and post-positivism support the application of a scientific approach and statistical measures to generate acceptable knowledge. However, in the context of post-positivism, prominence is given to critical multiplism (an improved form of triangulation) to falsify, instead of verifying, hypotheses (Guba and Lincoln, 2011).

Critical Theory, as stated by Collis and Hussey (2013), is defined by a personal research paradigm which helps to determine which methodology to adopt, and in turn helps to determine appropriate methods of collecting data. Any paradigm or combination of paradigms adopted for this study have implications for the methodology chosen (Cresswell, 2017; Guba and Lincoln, 2011) and the outcome of the overall result of the research.

Post-positivism did not completely fulfil the requirements for social scientific research and analysis, and was consequently challenged through critical theory and constructivism (Howell, 2013). Critical theory is a Neo-Marxist tradition, stemming from the Frankfurt Institute for Social Research (Wallace and Wolf, 1999; Howell, 2013), and



established in Germany in 1923. Marxism is a type of critical theory and critiques Capitalism as a system leading to alienation (Kincheloe and Tobin, 2009).

Critical theory according to Nielson (1992) aims to provide knowledge of society, its structure and its dynamics, thus enabling us to determine what our true interests are. Critical theory assumes historical realism, that is, reality is assumed to be apprehendable, shaped over time by an aggregation of social, political, cultural, economic, gender and ethnic factors (Guba and Lincoln, 2011).

Guba and Lincoln (2011) affirm that, epistemologically, critical theory is transactional and subjectivist, creating an interconnection between the object under investigation and the investigator, whilst the investigator's values imperatively influence the investigation. The transactional nature of critical theory requires a dialogue between the investigator and the subjects of the inquiry in terms of methodology (Guba and Lincoln, 2011).

The interpretivist/constructivist research paradigm emerged and developed from Edmund Husserl's philosophy of phenomenology. This was as a result of critiques of positivism in the social sciences (Mertens, 2005; Schwandt, 2000). It is characterised as constructivism (Easterby-Smith et al., 2015) and attempts to understand and explain human and social reality as a competing paradigm to positivism. Easterby-Smith et al. (2015) state that interpretivism is:

*“culturally derived and historically situates interpretations of the social life, suggesting that human action arises from the sense that people make of different situations, rather than as a direct response to external stimuli”* (p. 59).

Although interpretivism and constructivism are often used interchangeably and have similar meanings, Schwandt (2000) suggests that they differ in their epistemological

assumptions. The constructivist's intention to understand the world of human experience suggests that "reality is socially constructed" (Mertens, 2005, p. 5; Memery et al., 2005; Williams et al., 2010). Thus, all knowledge and meaningful reality is contingent upon human practices and interactions in society.

Consequently, constructivism rejects objectivism and a single truth as proposed in positivism and post-positivism. Bettis and Gregson (2001) maintain that researchers and those researched, or the phenomena studied, engage in a dynamic interaction that creates the meaning of findings. This makes the investigator and the object of investigation interactively linked, creating the findings as the research proceeds.

This study seeks to find meaning to social phenomena, and specifically brand switching. Following the long tradition of viewing possessions as the extended self (Belk, 1988; Gardner and Levy, 1999), the researcher draws directly from identity theory to propose that customers may develop customer-brand identity or a belief that they share the same self-definitional attributes with a brand or organisation. The current study extends this logic to investigate switching behaviours, hence the use of the constructivist paradigm for this research.

A participatory paradigm is based on liberation, Neo-Marxist and liberal human rights, hence in this context it is related to critical theory. The ontology of the participatory paradigm perceives reality as integrated with human existence, and interactions between subjective and objective perspectives are central (Howell, 2013). Thus, this paradigm rests on the belief that reality involves interactions between the world and the self and its inner historical being. Hence reality is co-created through the mind and cosmos or external world (ibid.).

Howell (2013) indicates that the epistemological position here involves critical subjectivity of the self in participatory transaction with the cosmos or other. He posits that findings are co-created through practitioner attributes such as experience and practical knowledge. Based on this, he holds the view that methodology in this paradigm encapsulates collaborative action and political participation through the primacy of practice and language grounded in shared experiences and situational contexts. As discussed, amongst the other paradigms of inquiry below (see Table 5.1) there are many that could be used to study brand loyalty and identity phenomena.

**Table 5.1: Paradigms of Inquiry**

Item	Positivism	Post-positivism	Critical Theory	Constructivism & Participatory
<b>ONTOLOGY</b> The form of reality. What can be known about reality?	Reality can be totally understood. Reality exists and it can be discovered.	Reality may only be understood imperfectly and probabilistically. Reality exists but humanity is unable to totally understand it.  (Critical realism)	Reality is shaped by history. Formed by values that are crystallised over time.  (Historical Realism) Breakdown of a clear distinction ontology and epistemology.	Reality is locally constructed. Based on experience although shared by many. Dependent on person/group changeable participation: co-created through mind and world.  (Relative Realism) Breakdown of a clear distinction between ontology and epistemology.
<b>EPISTEMOLOGY</b> The relationship between the investigator and what can be discovered.	The investigator and the investigation are totally separate. Values are overcome through scientific procedure. Truth is a possibility.	Abandonment of total separation of the investigator and investigation. Objectivity still pursued.	The investigator and the investigated are linked. Accepted that historical values influence the inquiry. Results in subjectivity.	As critical theory. However, the findings are created as the investigation proceeds.  Participatory: paradigm findings are developed between the researcher and cosmos.
<b>METHODOLOGY</b> How does the investigator go about finding out what he/she believes can be discovered?	Scientific experiments are based on hypothesis, these are usually quantitative. Conditions that confound are manipulated.	Multiple modified scientific experiment. Pursues falsification of hypothesis; may include qualitative methods.	Needs dialogue between investigator and the subject of investigation. Structures may be changeable. Actions affect change.	Creates a consensus through individual constructions including the construction of the investigator.

				Participatory: similar methodologies can be employed (primary action research).
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Adapted from Howell (2013, p. 29). Permission to reproduce this table has been granted by Prof. Kerry Howell.

## 5.4 Research Strategies

The chosen methodology is informed by a clear understanding of the research paradigm adopted for the study (Cresswell, 2007; Guba and Lincoln, 2011). There are several research methodologies which are products of different intellectual traditions in research. Saunders et al. (2009) outline different choices of strategies for conducting research and these include experiment, survey, case-study, ethnography, and grounded theory. Although these research strategies differ in their methodological frameworks, they seem to have similar methodological approaches to data collection.

### 5.4.1 Ethnography

The ethnographic approach to research attempts to understand culture by learning from structures, rituals and symbols, and the researcher becomes immersed in the cultural scene (Stern, 1994; Streubert and Carpenter, 1999). There are two main perspectives to ethnographic research, and these are positivist and phenomenological. The positivist ethnography “emerged through predominant social structure and gave rise to imperialist and colonial understandings of the other which usually illustrated a superior cultural attitude and perspective” (Howell, 2013, p. 122). This version of ethnography adheres to the empiricist notion of knowledge generalisation. On the other hand, Howell (2013) argues that the phenomenological perspective to eth-

nography along with critical theory and postmodern constructivist ethnographic approaches regard human understanding as subjective and relative.

Most ethnographers believe their main contribution is the development of “descriptive theory reflecting cultural knowledge, behaviours or meanings” (Omery, 1988, p. 29). In an effort to explain further, Hammersley and Atkinson (2007) argue that ethnography does not have sufficient capability for theory development. Ethnography requires the researcher to be submerged in a setting, to assume membership of the setting for inquiry to gain understanding of the phenomenon researched. Ethnography is beneficial when social conditions, attitudes, roles and interpersonal relationships are explored in conjunction with fundamental cultural prescriptions.

#### **5.4.2 Grounded Theory**

Grounded theory is a qualitative methodology that derives theory through the experiences and perceptions of human subjects. Grounded theory is a well-established, credible, rigorous and systematic methodology for inductively developing a theory, which helps understand complex social processes (Glaser and Strauss, 1967). Based on this research strategy, theory is derived from data with an aim of providing explanation to social circumstances and how they affect interactions, behaviours and experiences of the investigated (Benoliel, 1996).

Grounded theory is ideal for examining social issues (Corbin and Strauss, 2008). This methodology is compatible with the constructivist paradigm, and fits the objectives of this research. The aim of the research is to investigate the switching behaviour from an identity theory perspective. Grounded theory can perhaps be identified as the best alternative for this research, based on the nature of the research ques-

tions. Grounded theory entails the discovery of theory through the systematic collection, analysis and comparison of data.

Of the major methodologies outlined above, grounded theory is considered to be the most suitable methodology for this study which seeks to analyse data collected to confirm identity as the underlying factor for brand switching behaviour.

### **5.4.3 Hermeneutics**

Hermeneutics draws on the histories of the past as well as the histories of the present. Hence there is a mutual synthesis of past and present. Hermeneutics can be defined as:

*“the study of the principles of understanding historical texts. Its key tenet is the official recognition that people inhabit different cultural worlds and have different cultural experiences and the researcher draws on their own experiences to understand those other world meanings”* (Singh and Johnson, 2002, p. 118).

Gummeson (2000) identified hermeneutics as a term from the Greek, ‘hermeneutic’, meaning to interpret (p. 19). Hermeneutics leads to self-understanding and allows for the discontinuity implicit in one’s historicity, and the necessity of constructing plots (Perez-Gomez, 1999). Hermeneutics is of relevance to social, cultural and economic development and concerns the problem of interpretation. It has therefore been central to various traditions of scripture scholarship, legal studies, rhetoric, and literary criticism (Kidder, 1997). In textual interpretation, the anticipation of meaning in which the whole is envisaged becomes explicit in understanding that the parts, which are determined by the whole, themselves determine the whole (Gadamer, 2004). It is a “methodology which focuses on the historical and social context surrounding an action when interpreting a text and assumes a relationship of experience and the underlying dynamics or structures” (Hussey and Hussey, 1997, p. 77).

#### **5.4.4 Action Research**

Action research has been interpreted by management researchers in a variety of ways, but there are four themes within the literature. The first theme focuses on the purpose of the research and the extent to which it is a study in action instead of a study about an action. It is mostly concerned with the resolution of organisational issues (Coghlan and Brannick, 2014). The second relates to the involvement of practitioners in the research, which is normally a collaborative partnership between practitioners and researchers. The third theme emphasises the iterative nature of the process of diagnosing (fact finding and analysis), planning, taking action and evaluating. The final theme suggests that action research should have implications beyond the immediate project.

Action research differs from other research strategies because of its explicit focus on action, and in particular, promoting change in an organisation. It is therefore useful for 'how' questions. In addition, the researcher is involved in the action for change and the application of the knowledge gained (Saunders et al., 2009).

#### **5.4.5 Experiments**

Experiments are usually utilised in the natural sciences, typically characterised deliberate changes of components in an experiment, controlling other components (Saunders et al., 2009). Experiment was seen as non-applicable to this research considering the researcher had no absolute control over the phenomenon or subject for inquiry, as experiments aim to manipulate independent variables to detect changes in behaviour (Collis and Hussey, 2013). That was a situation impossible to achieve in this research.

#### **5.4.6 Survey**

Surveys are a useful, economic and efficient way of collecting huge amounts of data (Saunders et al., 2009). They further argue that this method has the advantage of allowing an analysis of data for easy comparison between respondents. This approach is usually associated with the deductive approach (Saunders et al., 2009) and positivist philosophical positioning (Collis and Hussey, 2013). As noted by Bryman and Bell (2015), survey research constitutes a cross-sectional design in relation to which data are collected. In this strategy, data collection is predominantly achieved via questionnaire or by structured interview on more than one case and at a single point in time. This allows the researcher to collect a body of quantitative data in connection with two or more variables before analysing data quantitatively using descriptive and inferential statistics (Saunders et al., 2009) to produce models of the relationships.

#### **5.4.7 Case Study**

A case study is defined as a practical inquiry into a real-life phenomenon, especially where there are no clear boundaries between the phenomenon and context (Yin, 2003b). In other words, the phenomenon and the context of the research are not always clearly distinguishable in real-life contexts. Case studies are particularly effective to use when asking 'how', 'what' and 'why' questions (ibid.). An advantage of using a case study is the close relationship that exist between the researcher and participant, during the data collection process. The process allow participants to be able to express their opinions of reality, and this helps the researcher to develop a deeper and better understanding of participants actions. However, the case study approach is seen as a useful tool for the exploratory stage of the research project.



## 5.5 Justification of Grounded Theory Methodology for this Study

Methodology serves to explain the explicit and implicit assumptions adopted by the researcher during the entire research process. The methodology serves as the foundation upon which the research is built. The chosen research methodology then identifies, to a large extent, the research methods for data collection and data analysis (Creswell, 2017; Denzin and Lincoln, 2011). As observed by Howell (2013, p. 1): “Methodology impacts on methods and has considerable influence on what knowledge is considered to be and the consequent outcomes of the investigation.”

Grounded theory has been selected as an inductive, qualitative methodology that is capable of exploring both the facts and the meanings attributed to a social situation by the actors. It is explicitly about theory building. The categories and concepts are grounded in the data, which gives them validity in the real world, but the interpretation and construction of theory results from the researcher's interaction with the data.

Grounded theory has been defined as theory that was derived from data, and systematically gathered and analysed through the research process. Based on this method, data collection, analysis and, eventually, theory stand in close relation to one another (Strauss and Corbin, 1998). The grounded theory methodological approach was developed by Glaser and Strauss (1967) during their study titled *Awareness of dying and time for dying*. It is a qualitative research method for the study of complex social behaviour from a sociological point of view.

Symbolic interactionism holds that human behaviour is understood as social behaviour made up of ‘social acts’. Advocates of social interactionism believe that “meaning is socially constructed and negotiated, and changes over time through the reflexive interaction of individuals” (Graham and Thomas, 2008, p. 116). This implies that

reality is experienced individually, and meaning results from interactions with the objects of that experience. Grounded theory focuses on behavioural patterns that shape social processes as people interact together in groups. The aim of grounded theory is to develop substantive theory which emerges from data through sets of highly developed procedures (Glaser, 1998).

With grounded theory, the study develops some level of abstraction, objectivity and sensitivity to words and statements throughout the research process (Patton, 2014). It is therefore worth considering a grounded theory methodology for examining managerial phenomena; what Locke (2001, p. 95) labels as “linking well with practice”. The choice of grounded theory as a methodology for this research is appropriate, relevant and suitable to develop a substantive theory around brand switching behaviour from an identity theory perspective. Viewed from an epistemological position, the constructivist approach to grounded theory is well suited to this research. The intention of constructivists to understand the world of human experience suggests that “reality is socially constructed” (Mertens, 2005, p. 5).

Consequently, constructivism rejects objectivism and a single truth as proposed by positivist and post-positivist schools of thought. Bettis and Gregson (2001) maintain that researchers and those that are researched, or the phenomena studied, engage in a dynamic interaction that creates the meaning of findings. This makes the investigator and the object of investigation interactively linked, creating the findings as the research proceeds, which alters the traditional distinctions between ontology and epistemology.

This study seeks to find meanings within social phenomena, and specifically, resistance to brand switching. Following the long tradition of viewing possessions as

the extended self (Belk, 1988; Gardner and Levy, 1999), the researcher draws directly from identity theory to propose that customers may develop customer–brand identities, or a belief that they share the same self-definitional attributes with a brand or organisation. This study extends this logic to investigate switching behaviours, hence the use of the constructivist paradigm. Charmaz (2008) noted that grounded theory consisted of systematic yet flexible guidelines for collecting and analysing qualitative data to construct theories ‘grounded’ in the data itself.

## **5.6 Developing Substantive Data Analysis**

Grounded theory has become a key qualitative research methodology in all areas of business, management, political, social, economic and corporate governance issues (Locke, 2001; Howell, 2000, 2002, 2013; Nwanji and Howell, 2005). The data collected for this research were analysed using grounded theory, by reducing unprocessed data into categories denoting concepts. The categories were then developed and integrated into a theory (Strauss and Corbin, 1998; Howell, 2002, 2013). This process is achieved by coding data. Grounded theory may be approached as a strategy, as much as a set of procedures, and it consists of three steps explained as follows:

### **5.6.1 Coding**

Coding is the practice of breaking down, conceptualising, and putting back together new ways (Strauss and Corbin, 1998) to form theory. This is achieved by raising critical questions and giving provisional answers about categories and their relations. The researcher identifies as many tentative categories and associated properties as possible using the three-phase coding process, specifically: open, axial and selective coding. This coding process is capable of systematically re-evaluating the distinct

units for their inter-relationships, enabling the researcher to move the data to a higher level of abstraction (Descombe, 2014; Goulding, 2002; Parry, 1997).

Coding in qualitative research is one way of exploring bits of information in the data, and looking for similarities and differences within these bits to categorise and label the data (Padgett, 2016; Patton, 2014). The use of coding entails that data is fragmented and placed in a categories through careful comparism. Similar data are placed in similar categories, and different data create new categories. Coding is iterative and interactive. It is an inductive, yet reductive, process that organises data. It is a comparative method that involves constantly comparing data from the same individual at different points in time and comparing incident with incident, and categories with categories (Charmaz, 2008; Glaser, 1998). In this way, the core variable accounting for greater variation in behaviour is discovered.

This research intends to build a substantive theory of brand switching from an identity theory perspective. Coding for process starts as coding for concepts begins, until the core category is built. It is therefore a part of the entire theory generation process from beginning to end. The difference between coding for process and coding of concepts and categories is actions/interactions, noting movement, sequences and changes, rather than properties and dimensions. According to Strauss and Corbin (1998, p. 168), process coding helps with integrating and discovering variation. Additionally, scrutinising data for process forces the researcher to look for patterns. By relating process to structure, categories are connected.

### **5.6.2 Open Coding**

Open coding breaks down, examines, compares, conceptualises, and categorises data, with the aim of developing categories. It is closely linked to open sampling and

provides the foundation of the research process (Howell 2002). Attention should be fixed on a category, and the properties that emerge must be continually coded and analysed as initial steps in the process. Ultimately, one constantly compares and continually categorises.

### **5.6.3 Axial Coding**

Axial coding is the re-construction of the data (split by open coding) by forming relationships between categories and sub-categories. Axial coding enables this research to bring the analysis together, to form a whole. The data, analysed as categories in open coding, are joined together in axial coding, which is “the act of relating categories to sub-categories along the lines of their properties and dimensions. It looks at how categories cross cut and link” (Strauss and Corbin, 1998, p. 124).

Categories are defined according to the context and the action/interaction strategies used to handle, manage and respond to this phenomenon in light of the context. They are influenced by the consequences of any action/interaction that is taken. Axial coding can help uncover relationships among categories from open coding through to axial coding, and the selective coding that follows.

### **5.6.4 Selective Coding**

Selecting a core category and analytically relating it to others, and confirming those relationships, is the main purpose of selective coding. Selective coding is the process by which all categories are unified around a core category (Corbin and Strauss, 2018). The data selection and the creation of categories will be processed with the core category in mind. The core category represents the central phenomenon of research. Howell (2013) suggested that it is very important to identify these patterns and to group the data accordingly, because this is what gives the theory specificity.

Grounded theory uses a combination of inductive and deductive thinking, in which we move between asking questions, generating hypotheses, and making comparisons. Selective coding integrates the research; it puts the story straight. It provides analysis, and identifies the core category, and it illustrates how major categories relate, both to it and to each other.

## **5.7 Constraints on Grounded Theory Approach**

Jones and Noble (2007) share the view that grounded theory in management research is in danger of losing its integrity. Furthermore, they argued that the methodology has become so pliant that management researchers appear to have accepted it as a situation of “anything goes”. “Grounded theory” is now loosely used as a generic term to refer to any qualitative approach in which inductive analysis is grounded in data. Bryant (2002) added that many researchers often use grounded theory unsystematically to mask their own – or their disciplines’ – methodological confusions. Wasserman et al. (2009, p. 355) argued that grounded theory:

*“provides no such systematic or transparent way for gaining insight into the conceptual relationship between the codes. And that various works on grounded theory have failed to provide any systematic way of using data specific levels of scale (the codes) to gain insight into more macro levels of the scale (concepts and themes)”.*

This makes it difficult and at times daunting for first-time users of grounded theory to understand the concept and process. Early researchers often find themselves overwhelmed at the coding level. This makes it difficult to ‘scale up’ to larger concepts or themes. The net result is often lower-level theories. In fact, the use of grounded theory never leads to grand social theory, nor should it be expected to do so, but this can be frustrating for some people (Myers, 2013).

The use of grounded theory does not guarantee that the researcher will come up with original and interesting results. As Strauss and Corbin (1998) point out, creativity is essential and grounded theory procedures should not be followed dogmatically and in an inflexible manner. Therefore, grounded theory procedures should be followed carefully, while at the same time trying to foster one's own critical and creative inspiration (Myers, 2013). There are some who claim to use the grounded theory method as part of an approach that does not seek to develop grounded theories, highlighting the confusion between grounded theory itself and grounded theory methodology (Bryant, 2002).

Bryman and Bell (2015) suggested that it is somewhat doubtful as to whether or not grounded theory, in many instances, really results in theory. Most grounded theories are substantive in nature. He suggests that they pertain to the specific social phenomenon being researched and not to the broader range of phenomena (although, of course, such theories may have broader applicability) (ibid.). Grounded theory is associated with an approach to data analysis that invites researchers to fragment their data by coding it into discrete chunks. To others, this kind of activity results in a loss of the sense of context and of narrative flow (Coffey and Atkinson, 1996).

## **5.8 Variances between Glaserian and Straussian Grounded Theory**

Generally speaking, grounded theory appears to be divided into two distinct variants, the Glaserian and Straussian schools of thought. Both disagreed about the nature of grounded theory (Strauss and Corbin, 1998). However, Glaser argued that this formalisation was simply far too restrictive, pointing out that the prescriptions may strangle emergent conceptualisation, and this might force the concepts into a pre-conceived mould (Myers, 2013). Glaser felt so strongly about Strauss and Corbin's

(1990) book that he wrote a rejoinder entitled *Emergence vs. Forcing: Basics of Grounded Theory Analysis* (Glaser, 1992). In this rejoinder Glaser suggested that Strauss and Corbin were no longer using grounded theory as it was originally intended, arguing that:

*“If you torture the data long enough, it will give up! [In Strauss and Corbin’s method] the data is not allowed to speak for itself as in grounded theory, and be heard from, infrequently it has to scream. Forcing by preconception constantly derails it from relevance”* (Glaser, 1992, p. 123).

By forcing acts to contaminate, corrupt, pre-empt and obstruct understanding of the data, the researcher will violate his/her restrained approach in which researchers maintain distance and independence from the phenomena they study (Locke, 2001). Howell (2000) contends that the dispute between Glaser and Strauss revolves around the issue of emergence and the forcing of data.

Glaser (1992) insists that two types of methodologies have sequential relation; first, the discovery of relevant hypotheses. The most relevant hypotheses may be tested for whatever use may require it. This researcher does not intend to use hypothesis or propose to test hypothesis for this research in order to address the research aims and objectives. Therefore the Straussian school of thought is more relevant to this research, mainly because the researcher shares the same views as Corbin and Strauss (2008) in their contradictions of Glaser’s (1992) view that “statements should be verified against data, not to necessarily negate our questions or statements, or disprove them, rather add variation and depth of understanding” (p. 108).

In evaluating the different views above between Glaser (1992) and Corbin and Strauss (2008), it appears that each believed that it is possible to utilise verification



as part of theory generation. Corbin and Strauss (2008) suggested that this is part of grounded theory. Glaser (1992), on the contrary, saw verification as a methodology in its own right (Howell, 2013; Strauss and Corbin, 1999; Strauss, 1990; Glaser, 1992). Strauss (1990) allows for a much more provocative, interventionist and interrogationist researcher influence over data. Strauss (1990) also suggested that techniques encourage researchers to use their own personal and professional experience and acquired knowledge as a positive advantage in the grounded theory process. This enhances theoretical sensitivity, rather than obscuring vision.

Glaser (1992) therefore suggested that Strauss and Corbin (1998) had created a verification method, and not a method that generates theory. Other researchers such as Urquhart et al. (2012) suggested that the disagreement between Glaser and Strauss and Corbin was based on two fundamental issues. The first disagreement is down to the coding process. Strauss and Corbin (1998) suggested breaking the codes down into four prescriptive steps; namely, open, axial, selective and coding for process. Glaser (1992), on the contrary, suggested using just three, which are open, selective and theoretical coding. The second major contention between Glaser and Strauss and Corbin is based on the fact that Glaser objected to the use of a coding paradigm and the “conditional matrix”, which are designed to provide ready-made tools for the conceptualisation process.

Based on these discussions, Annells (1996) and Parker and Roffey (1997) suggest that Strauss and Corbin (1998) have moved grounded theory to a more interpretivist or constructivist stance. In contrast with this seemingly more relativistic stance, Strauss and Corbin (1998) have provided a more rigid procedure (Gurd, 2008). Glaser (1992), by contrast, argues that this forces data into a model, and thereby cuts

off the development of interpretations by the constraining of theory. Furthermore, Gurd (2008) suggested that Glaser remained wedded to a belief in “emergence”, and that creativity comes from constantly developing concepts that fit all of the data, which are changed to meet each new data. Jones and Noble (2007) summarised the contrasts between and within the Glaserian and Straussian Schools, as shown in the Table below.

**Table 5.2: Contrast between the Glaserian and Straussian Schools**

<b>GLASERIAN SCHOOL</b>	<b>STRAUSSIAN SCHOOL</b>
Everything emerges in a grounded theory. Nothing is forced or preconceived. Researchers are distant and unknowing as they approach data, with only the world under study shaping the theorising.	<b>1990, 1998:</b> The researcher adopts a more active and provocative influence over data, using cumulative knowledge and experience to enhance sensitivity. Logical elaboration and preconceived tools and techniques can be employed to shape the theorising.
<b>Development of theory</b>	
The goal is to generate a conceptual theory that accounts for a pattern of behaviour which is relevant and problematic for those involved.	<b>1998:</b> Conceptually dense, integrated theory development is the only legitimate outcome.  <b>1990, 1998:</b> Grounded theory can also be used for developing non-theory (conceptual ordering or elaborate description).
<b>Specific, non-optional procedures</b>	
The method involves clear, extensive, rigorous procedures and a set of fundamental processes that must be followed.	<b>1998:</b> Grounded theory encompasses a number of distinct procedures that must be carried out.  <b>1990, 1998:</b> Researchers can cherry-pick from a smorgasbord table, from which they can choose, reject or ignore.
<b>Core category</b>	
The theoretical formulation that represents the continual resolving of the main concern of the participants.	<b>1990, 1998:</b> The main theme of a predetermined phenomenon which integrates all other categories and explains the various actions and interactions that are aimed at managing or handling the relevant event, happening or incident.
<b>Coding</b>	
Open, selective and theoretical.	Open, axial and selective, but with the following variations:

**1998:** Selective coding is an “emergent” process based on continuous use of memo sorting and integrative diagrams.

**1990:** Selective coding employs the “forcing” mechanism of the coding paradigm.

**1998:** Paradigm model dropped, and an emergent process based on memo sorting is again stressed.

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Source: Adopted from Jones and Noble (2007, p. 93).

## **5.9 Justification of Paradigm of Inquiry for this Research**

As stated by Collis and Hussey (2013), our personal research paradigm helps us to determine which methodology to adopt and, in turn, determines the methods of collecting data. Any paradigm or combination of paradigms adopted for this study has implications for the methodology chosen (Cresswell, 2017; Guba and Lincoln, 2011) and the outcome of the overall result of the research. Considering the research paradigms discussed, there are different approaches that can be deployed in a study of switching behaviour and loyalty. Most brand loyalty research seems to employ a “positivistic paradigm where reality is external to humanity and ... the researcher and the researched pursue distance and ensure objectivity” (Nwanji and Howell, 2004, p. 10). However, this study adopts a combination of phenomenology and constructivism, together with grounded theory, due to its suitability to the research objectives as outlined in Chapter One.

Constructivism is adopted for this research, particularly because it allows for an investigation of the contemporary phenomena of brand loyalty and switching behaviour, based on the symbolic interaction of customers. The basic assumption underly-

ing this study is that people are constantly involved in social interactions and constantly interpreting the changing world around them. The constructivist view is that people construct knowledge by inventing concepts, models and schemes of the world. In the context of constructivism, humanity alone is responsible for knowledge development, and understanding is a matter of interpretive construction on the part of the active subject. Guba and Lincoln (2011) posited that in terms of the constructivist paradigm, the core assumption is that realities are not objectively “out there” but are constructed by people, often under the influence of a variety of social and cultural factors that lead to shared construction. Hence, the study adopts a combination of phenomenology and constructivism to identify behaviour, beliefs, attitudes and knowledge.

## **5.10 Conclusion**

Whilst taking orientation from the brand loyalty literature and identity theory, this study proposes a conceptual framework to examine the issues of loyalty and switching behaviour in a specific market disruption, and specifically the introduction of a radically new brand.

With the aim of theorising brand switching behaviour as social mobility, this study identifies phenomenology as an appropriate philosophical position to adopt in undertaking research, as the researcher is interested in processes and meaning through a description of people’s experiences, behaviours and social contexts without using statistical procedures (Strauss and Corbin, 1998; Saunders et al., 2009).

The constructivist paradigm, according to Bettis and Gregson (2001), enables researchers, and those researched, or the phenomena studied, to engage in a dynamic interaction that creates the meaning of findings. Hence, constructivism is used to

create dialogue between the investigator and the subjects of the inquiry. Finally, an overview of the data collection techniques and procedures for this study is elaborated upon in this chapter. Grounded theory entails the discovery of theory through the systematic collection, analysis and comparison of data. Semi-structured interviews and survey questionnaires as techniques for data collection were examined as potential methodological tools and their application to the research context was considered.

# CHAPTER SIX

## DATA COLLECTION AND GROUNDED THEORY CODING PROCEDURE

### 6.1 Introduction

The purpose of this chapter is to establish appropriate research methods that can be deployed in order to collect data aimed at addressing the research aims and objectives, and coding procedures that fit the qualitative grounded theory methodology adopted for this study.

This chapter opens with a discussion of data sampling, followed by data accessibility and challenges. Data collection methods including questionnaires and interviews are also considered in this chapter. Charmaz (2018) suggested that methods extend and magnify our view of studied life and, thus, broaden and deepen what we learn of it, and know about it.

Howell (2013, p. 194) added that:

*“No matter what philosophical position or paradigm of inquiry is used in a research project, it is always possible to use a combination of research methods when collecting data. The rationale for the balance between these methods will depend on the objectives of the research and the extent to which qualitative or quantitative techniques are to be utilised”.*

Likewise, Creswell (2017) holds the view that the preferred methods depends on the type of evidence to be gathered for the study, or whether it is to be allowed to emerge from participants in the project. Within the confines of grounded theory, data collection is shaped and reshaped and, therefore, the data collected are refined

(Charmaz, 2000). The data for this research were collected across two main stages using open-ended questionnaires and semi-structured interviews.

## **6.2 Data Collection Process**

As indicated in Chapter One, the data for this research were uniquely collected from across the United Kingdom and Ghana. A cross-country analysis seeks to understand the phenomenon, behaviours and developments in one national group context compared to another. The unique role of these situational opposites in building resistance to brand switching during market disruptions in a competitive market can thus be examined. The main strength of this approach stems from the observation that switching behaviours in one context can often be influenced by various factors. The focus is often on unearthing the common factors underlining brand switching with empirical data across countries.

Data collection for this research was undertaken across two main stages; the first stage was survey questionnaires. The researcher initially contacted 70 potential participants in the United Kingdom and Ghana, who indicated their willingness to participate in the completion of questionnaires. Out of the 70 contacted, 62 respondents completed the questionnaire, while 2 respondents began to complete it, but did not finish. Their feedback was therefore rejected, and not considered as part of the data analysis process. Initial contact was made with participants through phone calls and emails. Prior to sending the questionnaires to conduct the survey, detailed information was sent to respondents which set out various issues relevant to the study, including statements of confidentiality, indications about the purpose of the study, the context in which it was to be conducted, and the participants' prerogative to withdraw from the research at any time (Appendix C).

This was followed by a request to complete a questionnaire administered via Qualtrics software. Qualtrics is a generalised survey service permitting the creation of survey instruments and the distribution of the surveys as well as data storage and analysis. Qualtrics software permits users to execute various activities online, including, collecting and analysing data. It also allows the facilitating of market research on, customer satisfaction and loyalty, product and others. Qualtrics was chosen to conduct this survey because it meets stringent information security requirements that may not be a feature of most free online survey tools. Most importantly, its quality control features that prevents multiple submissions from a single survey participant is very relevant for this study to prevent a participant from submitting multiple data. Again, the researcher found Qualtrics to be user-friendly and its ability to handle complex designs.

The second stage of the data collection process was to carry out interviews. The interviews were conducted via Skype. Skype is an application that provides video chat and voice call services. The researcher and participants may exchange such digital documents as images, text, video and many others, and may transmit both text and video messages. Skype also allows for the creation of video conference calls. Skype is available for Microsoft Windows, Macintosh, as well as Android, Blackberry, Apple and Windows Smartphones and tablets. The researcher was thus able to communicate directly with participants over the Internet by voice using a microphone and was able to view and broadcast video via a webcam.

The dates for interviewing participants via Skype varied significantly from the date of initial contact, and again prior to conducting the interviews, detailed information was sent to respondents including statements assuring confidentiality and a covering cor-



respondence indicating the purpose of the study. The participants were briefed about the context of the study and how it was to be conducted, and participants were assured that they could withdraw from the research at any time. A copy of the questions and a statement introducing the researcher as a student of Plymouth University (Appendix C) were also added.

The researcher carried out semi-structured interviews as and when interview dates were confirmed, and these depended on the location of participants and the convenience of the arrangements. 14 participants took part in interviews conducted across the UK and Ghana, comprising 7 participants from Ghana and 7 from the UK.

The Judgemental sampling technique was used to select participants for this research. Their suitability as participants in the research population was based on their willingness to participate in the interview process. The researcher used his own professional and personal networks and recommendations from colleagues to contact a mix of potential participants. The in-depth semi-structured interviews were conducted over a period of six weeks, and each interview lasted between 25-30 minutes. Although the researcher used an interview guide, the sequence of questioning depended on the responses given. There were instances when questions were added to further probe for answers and explanations. Probing was also used by the researcher to obtain a fuller response. During the interview process, the researcher aimed for an open approach to questioning to see if participants might happen upon issues that had not yet been discussed in the literature. Interviews were predominantly audio-taped, accompanied by hand-written notations. Each interview was coded along with written memos before proceeding to the next. Interviewees were also given the opportunity to include views on topics in which they had a particular interest, which the

interviewer had not addressed. The audio-tape recordings were further transcribed to ensure accuracy and verifiability.

### **6.3 Data Accessibility and Challenges**

The success of gaining access to users of Smartphones who were willing to allocate a few minutes out of their busy schedules to contribute to this research depended a great deal on serendipity, personal networks and the particular circumstances at any given time. Researchers should attempt to pursue as many different avenues as possible in a polite yet persistent and opportunistic manner (Yeung, 1995). The researcher followed this approach to access relevant people (users of Smartphones) to enable the collection of primary data. Arrangements were made for the distribution of questionnaires via Qualtrics and for interviewing via Skype, according to the time available.

The judgemental sampling technique was employed, which allows the researcher to select participants based on their experience of the phenomenon. Participants identified as users of Smartphones who mainly were friends and family and members of my alumni groups in both Ghana and the UK formed the population of participants.

As mentioned earlier in this chapter, the researcher received a completed written consent form from respondents before they participated in the research. If respondents recommended other people, the respondent contacted them and received permission from these participants in the first instance, before providing their names and contact information to the researcher. The participants selected for the study were those who had access to the information required, and who were willing to reflect on the phenomena of interest and had the time and were willing to participate in the research (Morse and Richards, 2002). In order to stimulate a greater response from

the interviewees, the interviewer adopted strategies including using encouraging phrases such as “Really?” or “Interesting!” and note-taking with occasional glances at the interviewee was routine (Dexter, 2006). At the end of each interview, the researcher asked if interviewees had any comments, observations or criticisms regarding the research. This is important to gauge how each the interview went, as well as for determining whether or not there were certain questions or areas of research that had been overlooked.

Gaining access to interview respondents across the country proved challenging, and the researcher could not reach agreement on a specific time frame that seemed optimal for travelling to Ghana to conduct primary data collection. Thus time was of the essence, and negotiation for a time period suitable for all the targeted participants took longer than expected. This problem necessitated the collection of data electronically. The process of data collection for this research was constrained by a number of unique factors that affect Ghana as a nation.

Ghanaians generally are very reserved and many respondents shied away from contributing to data. Notably, the climate of fear, paranoia and intimidation in Ghana is so intense that any approach to conducting interviews or carrying out questionnaires was met with suspicion. As a result, finding the right participants to provide information and offer a meaningful contribution to the research was particularly challenging. Other contributory factors included the fact that some participants felt that they were too busy to help with the research project, coupled with the impression that data was being collected for a large multinational technology firm so they had little interest in participating.

In addition, the process of conducting Skype interviews was equally challenging, mainly because of technological problems. Ghana, like other developing countries, does not have high-speed Internet access compared to the UK, therefore communication via Skype was always difficult.

## **6.4 Sampling and Data Collection Methods**

A sample is defined as the segment of the population that is selected for research (Bryman and Bell, 2015). Thus, it is a subset of the population. Bryant and Charmaz (2011) argue that sampling techniques must be targeted and efficient.

Morse (2006), cited in Bryant and Charmaz (2011, p. 234), added that an excellent “qualitative inquiry is inherently biased. By biased, they mean it has been deliberately sought out and selected. This bias is essential if we are going to do good work, and this bias is not something that impairs the rigour of the research.”

The method of sampling used in this research is called judgemental sampling. It was suitable as the participants are selected by the researcher based on their experience of the phenomena under study. In judgemental sampling, the researcher makes the decision prior to the commencement of the research and does not pursue other contacts that may arise during the course of the study (Collis and Hussey, 2013). The goal is to gain rich and detailed insights into the complexity of social phenomena. Saunders et al. (2009, p. 204) in commenting on sampling suggested that “effective sampling enables the researcher to consider the most appropriate sub-group from the population for the data collection instead of focusing on the whole”. Furthermore, Creswell (2017) deemed quantitative sampling to be random, and qualitative sampling to be purposeful; a view exploited by this researcher through the selection of users of Smartphones.

The data collected for this research is qualitative, using primary and secondary data collection techniques. The research made use of secondary data which included in-house gazettes, data published by national newspapers, books, articles, interviews, and journals (Nwanji and Howell, 2004; Nwanji, 2006; Sorour, 2011; Boadu, 2013; Ibrahim, 2013).

A research method consists of a set of specific procedures, tools and techniques to gather and analyse data. A method is the practical application of doing research. Regardless of the philosophical stance or paradigm of enquiry adopted in a research project, it is possible to use a combination of research methods when collecting data (Howell, 2013). The methods of data collection vary along a continuum from quantitative methods at one end, to qualitative methods at the other.

Saunders et al. (2009) identified two main types of data that emerge in a research project. These are primary data, collected for the specific purpose of the project, and secondary data, which are collected for the research project from other sources. Primary data are gathered and assembled specifically for the research project at hand (Zikmund, 2003). However, the most common sources of data collection in qualitative research are interviews, observations, and review of documents (Creswell, 2017; Locke et al., 2010). Howell (2013) indicates that data can be collected through a number of different methods, including survey or questionnaire, interviews, observations and focus groups. The researcher's choice of data collection methods is influenced by the nature of the research questions and objectives (Robson, 2002) and the methodological strategy.

In line with the aims and objectives of this study, outlined in Chapter One, the researcher used both primary and secondary data collection methods to build a sub-

stantive theory. Survey questionnaire and interview techniques were the main data collection methods used for this study. These data collection methods are suitable in the context of a qualitative grounded theory methodological approach to data collection which relies on understanding processes and behaviours that necessitate brand switching.

## **6.5 Survey Questionnaires**

A survey is a systematic method for gathering information which involves asking a large group of respondents questions about a particular issue, with the purpose of describing the attributes of the larger population of which the individuals are members. This provides a quantitative or numeric description of trends, attitudes or opinions of a population (Creswell, 2017). Howell (2000, 2013) asserts that the “survey technique is not purely a grounded theory method of data collection” (p. 40). However, the author admits that it can be used in certain ways in grounded theory to further theory generation.

As observed by Jill and Roger (2003), questionnaires are lists of carefully formulated interrogations, considered and used, with a view to producing reliable answers from a population sample. According to Saunders et al. (2009), a questionnaire is a general term to include all practices of information gathering allowing each participant to respond to the same set of questions in a prearranged order.

Two main forms of questionnaires exist: self-administered questionnaires which are administered electronically through the Internet or an intranet, posted to respondents or delivered by hand to each respondent and collected later; and interviewer administered questionnaires, recorded on the basis of each respondent's answer (Saunders et al., 2009).

## 6.6 Interviews

Interviews are defined as primary data collection techniques for gathering data when qualitative methodologies are used (Cooper and Schindler, 2006). Baker and Foy (2008) note that an interview involves a personal exchange of information between an interviewer and one or more interviewees, in which the interviewer seeks to obtain specific information on a topic with the co-operation of the interviewee(s). That is, an interview refers to any person-to-person interaction between two or more individuals with a specific purpose in mind. Interviews vary considerably in their structure, from highly formal (structured), in which the interviewer follows exactly a designed and worded questionnaire, to highly informal (unstructured), in which the interviewer introduces the topic of interest and lets the discussion develop naturally by asking the respondent to expand on or clarify points made (Baker and Foy, 2008). Unstructured interviews are informal interviews that enable the researcher to explore an issue with more insight. This implies that interviewees are allowed to speak by using open questions and encouraging further clarity of interviewee statements. The third type, the semi-structured interview, is a combination of both closed and open-ended questions, and it falls between the two (Saunders et al., 2009; Baker and Foy, 2008). In terms of semi-structured interviews, the researcher is allowed to vary the order and number of questions according to the flow of conversation and the specific organisational context encountered in relation to the research topic (Saunders et al., 2009).

The semi-structured interview approach was chosen for this study because this method allows participants to elaborate on the discussion wherever necessary. Semi-structured interviews encourage participants to freely bring up issues that they feel are relevant to the topic under discussion. This means that there is an opportuni-

ty to probe and understand the meaning, attitudes, opinions and personal experiences of participants. Similarly, Liu et al. (2014) share the view that in-depth interviews can provide the researcher with the opportunity to probe participants' answers, especially where the researchers want the interviewees to explain or build on their responses. The use of semi-structured interviews for this research also brings in some added advantages which include the following.

First, semi-structured interviews provide a set of preconceived questions and therefore allow for deviation and more open discussion (Wengraf, 2004). Secondly, the use of this data collection technique aligns well with an exploratory approach as semi-structured interviews enable the "seeking of insights". This is achieved through the flexibility of using the technique, which affords the opportunity to explore responses, seek clarification and explanation, and develop discussion. Where appropriate, the interviewer can employ probing techniques (Kerfoot et al., 2003). In addition, semi-structured interviews are also useful when the process or research methodology is inductively driven (Howell, 2013; Patton, 2014). Again, the use of semi-structured interviews provides an opportunity for an in-depth understanding of the situation, and the individual position within this context is imperative for the analysis. It is also helpful because a comprehension of worldviews, cultures and norms were required for this study (Ibrahim, 2013). This can further enhance the research because an understanding of the underlying rationale for beliefs and attitudes is also an important factor. As the name suggests, semi-structured interviews are a hybrid of structured and unstructured interviews (Wengraf, 2004; Howell, 2013; Patton, 2014). The use of this method is also beneficial for an inexperienced interviewer because it ensures that the interview remains on the right track, while at the same time it enables an opportunity for wider discussion (Wengraf, 2004; Howell, 2013; Patton,



2014). Furthermore, by conducting a semi-structured interview the researcher is likely to leave with some information relevant to the study (Wengraf, 2004). Interviews can also be used to follow up on certain participant responses to questionnaires for further investigation (Saunders et al., 2009).

The results of the interviews were analysed using grounded theory coding procedures; initially using open coding, to identify categories that emerged from the data (Nwanji, 2006; Sorour, 2011; Boadu, 2013; Ibrahim, 2013). Further analysis of these categories through axial coding established relationships between sub-categories (Nwanji, 2006; Sorour, 2011; Boadu, 2013; Ibrahim, 2013). Through selective coding, core categories were identified (Nwanji, 2006; Sorour, 2011; Boadu, 2013; Ibrahim, 2013). The following are some of the reasons why the researcher chose interviews as a method of data collection.

Interviews have the ability to give an in-depth comprehension of the data under analysis, or to provide a basis for a numerical study through a scale or matrix (Wengraf, 2004; Patton, 2014). Interviews are also perceived as a means of developing an accurate interpretation and understanding of a given situation (Wengraf, 2004). Interviews, according to Howell (2013), also provide data collection mechanisms that enable description, interrogation, evaluation and consideration of personal accounts, or biographical and historical data. Interviews can be confrontational and can create an environment conducive to storytelling. Finally, there is very little training required to conduct interviews, because they have become institutionalised, and the norms embodied within them are second nature for individuals and society (Collis and Hussey, 2013).

The interview technique, however, is not without weaknesses. Interview limitations include possibly distorted responses due to personal bias, anger, anxiety, politics, and a simple lack of awareness, since interviews can be greatly affected by the emotional state of the interviewee at the time of the interview (Wengraf, 2004; Patton, 2014). Investigation through questions and answers involves ambiguity, and interpretations of answers will always involve a level of subjectivity (Howell, 2013). In any interview, the interviewer will have some impact on the interview and interviewee and there is always scope for bias in terms of sexuality, gender, race or class (Collis and Hussey, 2013). Howell also argued that expectations from the research may overshadow what is discovered or emerges. Bias and subjectivity are difficult to negate in all interviews, because what is said pre-interview could influence responses (Howell, 2013). Qualitative research often attracts criticism in relation to the reliability and validity of data, given the personal influences and involvement of the researcher in the research process (Collis and Hussey, 2013). Bryman and Bell (2015) also argued that interviewing people for a day or so will not necessarily inform the researcher of their behaviour.

## **6.7 Secondary Data**

Secondary data refers to any data gathered that has been previously published (Myers, 2013). Through the literature review, secondary data were identified and used to support the plans around primary data collection. There are a number of research works from the UK and beyond which helped focus the data collection in relation to the research questions, methodology and objectives. Even though interviews and survey questionnaires are the major data collection methods used in this research, other secondary sources, mainly journals and text books, were also used to complement the primary data in the process of the research, which enabled the re-

searcher to develop a greater understanding, awareness, depth of knowledge and appreciation of the literature that exists in this area of research.

These documents complement the existing primary data, thus forming an integral part of the theoretical framework which underpins the research. The knowledge and understanding acquired as a result of combining the primary and secondary data collection techniques used for this research enabled the researcher to develop a greater understanding and awareness of brand loyalty and identity issues in terms of how these impacts switching behaviour.

## **6.8 The Grounded Theory Coding Process**

The aim of grounded theory is to generate new substantive theory grounded in data where little is already known, or to provide a fresh perspective on existing knowledge about a particular social phenomenon (Strauss and Corbin, 1998; Goulding, 2002; Dick, 2002). The theory to emerge reveals a contextual explanation of a phenomenon rather than descriptions of complex social processes (Strauss and Corbin, 1998; Glaser, 1998). The interviews were evaluated for content analysis using the three-phase grounded theory method of open coding, axial coding and selective coding.

Coding is the process by which data are broken down, conceptualised, and put back together in new ways (Strauss and Corbin, 1998) to form theory by raising critical questions, and giving provisional answers about categories and their relations. The researcher identifies as many tentative categories and associated properties as possible using the three-phase coding process. This coding process is capable of systematically re-evaluating the distinct units for their inter-relationships, enabling the researcher to move the data to a higher level of abstraction (Descombe, 2014; Goulding, 2002; Martin and Turner, 1986; McCallin, 1999; Parry, 1997). Strauss and

Corbin (1998) describe a process as a series of evolving sequences of action/interaction that occur over time and space, changing or sometimes remaining the same in response to the situation or context. Thus, the coding process is essential in generating a substantive theory because it acts as the organising thread or central category. Coding in qualitative research is one way of exploring bits of information in the data, and looking for similarities and differences within these bits to categorise and label the data (Padgett, 2016; Patton, 2014).

During coding, data was broken down, compared, and then placed in a category. Similar data are placed in similar categories, and different data create new categories. Coding is iterative, interactive, and inductive, yet it is also a reductive process that organises data. Line by line, coding can ensure that the researcher's beliefs are not imposed on the data and interpretations (Howell, 2013, p. 138).

The coding process starts as coding for concepts begins, until the core category is built. It is therefore a part of the entire theory generation process from beginning to end. The difference between coding for process and coding of concepts and categories is actions/interactions, noting movement, sequence and changes, rather than properties and dimensions. According to Strauss and Corbin (1998, p. 168), process coding helps with integrating and discovering variation. Additionally, scrutinising data for process compels the researcher to look for patterns, and by relating process to structure, categories are connected. In grounded theory research, data collection and data analysis occur concurrently. Qualitative interview data were systematically collected and analysed in an attempt to understand both the structure (why) and process (how) inherent in the brand loyalty and identity issues among users of iPhones across the UK and Ghana.

### **6.8.1 Open Coding**

Open coding is “the first step of a theoretical analysis through which categories and their properties are discovered” (Strauss and Corbin, 1998, p. 101). This is what Glaser (1998) termed as running the data open. During open coding, “data is broken down into discrete parts, closely examined, and compared for similarities and differences” (Strauss and Corbin, 1998, p. 102). This process exposes data and uncovers the thoughts, ideas and meanings attached to yield concepts. Data analysis began with a microscopic (sentence-by-sentence) examination of each interview transcript (Strauss and Corbin, 1998). The open coding process was used to create initial codes for comparisons. It identifies salient incidents and concepts, and explores any emergent attributes. Incidents were compared by asking key questions of the data such as: “What is this data a study of? What category or property does the incident indicate?”

At this stage of the investigation, the researcher remained open in terms of the structure and direction of the interviews to allow concepts to emerge naturally, without forcing them into predefined categories (Glaser, 1998). Concepts that accurately captured the thoughts and meanings of participants were developed. Open coding serves as the first step of a theoretical analysis towards the discovery of categories and their properties (Glaser, 1998; Strauss and Corbin, 1998). Variables involved in the phenomenon are identified, labelled, categorised and related together in an outline form, in open coding. Data gathered were constantly compared (Strauss and Corbin, 1998) whilst words, phrases, sentences and the paragraphs of field notes were considered alongside other indicators in the data. Incidents were compared with incidents, and concepts with concepts to identify similarities and differences

(Glaser and Strauss, 1967; Strauss and Corbin, 1998). A number of concepts emerged as the interview process progressed.

A concept is defined as an “abstract representation of an event, object, or action or interaction that a researcher identifies as being significant in the data” (Strauss and Corbin, 1998, p. 103). The listed emerging open concepts were constantly compared and grouped under common characteristics called open categories. They define a category as concepts that stand for a phenomenon, and drive conceptualisation to a higher level of abstraction (ibid.). Through the process of constantly questioning, the identification of categories occurs during open coding, and the process of moving beyond description to conceptualisation begins. In other words, by using the constant comparison method of comparing code-to-code, incident-to-incident, looking for similarities and differences, emerging categories were identified (Creswell, 2017).

### **6.8.2 Axial Coding**

Axial coding is the second stage of the application of grounded theory to the development of a substantive theory for brand loyalty and identity theory in relation to switching behaviour. Axial coding is the system of reconstructing information that has been fragmented through open coding and relating categories to sub-categories. The prime purpose of axial coding is to establish relationships between categories, properties and dimensions that emerged from the open coding stage. Axial coding is concerned with a re-examination of the categories identified in open coding to determine the linkages between them (Strauss and Corbin, 1998). In axial coding, data is regrouped by coding to detect causal relationships between categories. The purpose of the axial coding process is to make explicit connections between categories and sub-categories (Pandit, 1996). Here, the researcher develops a conceptual

model that explains the relationships between categories in order to understand the phenomenon to which they relate.

### **6.8.3 Selective Coding**

Selective coding is the final coding phase of the grounded theory process. The fundamental objective of selective coding is to explain the story line (Strauss and Corbin, 1998) and advance this through the work of establishing categorical relationships. This involves the process of systematically relating the categories to other categories and validating those relationships. A substantial overlap exists between the analysis of axial coding and the interpretation of selective coding analysis (Strauss and Corbin, 1998). Once the core category is discovered, participants are asked specific questions to further “saturate” the category. All categories are then integrated together and a theory grounded in data emerges.

## **6.9 Conclusion**

This chapter has provided an overview of the data collection and coding procedures for this study, followed by a discussion of the method of sampling used in the research. Specifically, judgemental sampling was used, and this is similar to snowball sampling, as the participants are selected by the researcher on the strength of their experience of the phenomena under study. In judgemental sampling the researcher makes the decision prior to the commencement of the research and does not pursue other contacts that may arise during the course of the study (Collis and Hussey, 2003).

For this study, data were drawn from participants from Ghana and the UK through semi-structured, in-depth interviews and survey questionnaires. In addition, data was also drawn from a review and analysis of journal articles and books. A total of 74

participants drawn from across the UK and Ghana took part in the data collection exercise. All interviews and surveys were conducted electronically, via Skype and Qualtrics, to facilitate a speedy and easy way of reaching respondents. This method was particularly useful when considering the difficulties encountered and time constraints associated with collecting primary data based on a grounded theory approach to research.

Using the three coding methods of open, axial and selective coding associated with the grounded theory method, data collection and analysis occurred concurrently. The next chapter focuses on analysing the semi-structured interviews and survey questionnaire data using open coding. Open coding is the first stage of the grounded theory method of data collection aimed at developing a substantive theory.



## **CHAPTER SEVEN**

### **DATA PRESENTATION AND ANALYSIS: OPEN CODING**

#### **7.1 Introduction**

The main aim of this chapter is to introduce open coding analysis based on the survey questionnaires. Sixty (60) open-ended survey questionnaires were fully completed. Participants and respondents were Smartphone users from the UK and Ghana and each was aged 18 years and above. The chapter outlines how the analysis of open coding was applied to the survey questionnaires. The objective of open coding is to break data into concepts by using theoretical coding procedures and the constant comparison method.

The same structure was adopted for the in-depth interviews, also covered in this chapter. One of the simplest ways to analyse qualitative data is to code data. Collis and Hessey (2013) described codes as tags or labels for assigning units of meaning to words, phrases, sentences or whole paragraphs, connected or otherwise to a specific sentence during the study. Codes that emerged were tested for theoretical relevance, and only concepts that showed persistent occurrence in the data formed open categories. Conceptually, similar data that were deemed important to the participants were collected together to form these open categories (Strauss and Corbin, 1998). Based on simultaneous data collection and analysis, open coding resulted in concepts and categories and the identification of their properties and dimensions.

## **7.2 Analysis of Survey Questionnaire Data**

This section presents an analysis of the process of how open coding analysis was applied to the open-ended survey questionnaires. In grounded theory research, data collection and data analysis occur concurrently. Qualitative interview data were systematically collected and analysed in an attempt to understand the personal lifestyle and brand perceptions of consumers in determining issues underlying loyalty and switching behaviour from an identity perspective. This was done across both the UK and Ghana to ensure that bias was eliminated. The survey questionnaire transcripts generated from Qualtrics were analysed using open coding. During open coding, data gathered was fragmented into parts, then examined, and compared to identify for differences and similarities (Strauss and Corbin, 1998). This process exposes data and uncovers the thoughts, ideas and meanings expressed by respondents.

At this stage of the investigation, the researcher remained open-minded in terms of the structure and direction of the data compiled, to allow concepts to emerge naturally without forcing them into predefined categories (Glaser, 1998). The concepts that accurately captured the thoughts and meanings of respondents in relation to the phenomenon were developed. A concept is described as an “abstract representation of an event, object, or action or interaction that a researcher identifies as being significant in the data” (Strauss and Corbin 1998, p. 103). A number of concepts emerged as questionnaires were completed by respondents and these were recorded using memos, with implications for noting the relationships between codes (Razavi and Iversion, 2006). Glaser (1998) considered memos as theorising writing of ideas about substantive codes and any coded relationships that emerge theoretically. Incoming data were constantly compared, concept with concept to identify similarities and differences (Strauss and Corbin, 1998). Emerging codes were tested for

theoretical relevance, and only concepts that showed persistent occurrence in the data collected formed open categories. Conceptually, similar data that were deemed important to the respondents were collected together to form these open categories (Strauss and Corbin, 1998). They defined categories as comprising concepts that stand for a phenomenon and drive conceptualisation to a higher level of abstraction. As part of the open coding process, categories are further specified in terms of their properties and the dimensions of these properties. Properties are attributes or characteristics pertaining to a category, whereas dimensions locate properties along a continuum (Corbin and Strauss, 2008).

The open codes emerged from the responses to the survey questions. The researcher identified the substantive codes in the scripts using the respondents' own words as much as possible. Subsequently, a list of codes was compiled and they were compared against the original scripts to make sure that the code was used constantly throughout.

Data from Questions 1 and 4 indicated that out of the 60 participants who confirmed that they were users of Smartphones and fully completed the survey, 27 were males and 33 were females and their ages ranged from 18 to 60 years. As per the descriptive statistics of data gathered (see appendix G), respondents emerged from diverse career backgrounds and positions across various industries including health, education, banking, insurance and information technology (IT). This provided a level platform to generate an unbiased view of their experiences with the phenomenon of brand switching in relation to disruptions caused by technological innovations.

In **Question 8**, respondents were asked what they would opt for if they decided to change their current Smartphone (iPhone). The following is a sample of views expressed by respondents.

*The majority of respondents mentioned that they would make a **repeat purchase of same brand**, but with an upgrade, while a few indicated that they would also make a **repeat purchase from the same brand** but without an upgrade. None of the respondents opted to buy a different brand.*

In **Questions 9 and 10**, respondents were asked if the brand symbol gave them recognition and reflected their personality. The following is a sample of views expressed by respondents to illustrate how the concepts and categories emerged through the process of coding.

*“Yes, the iPhone brand **gives me some recognition** and **self-esteem**, because it’s a **unique brand**. All the senior colleagues use the iPhone as it offers **functions** easy to plan and organise our activities with. I think the iPhone brand does not reflect my personality” (Health worker, Ghana).*

*“Yes, the iPhone brand provides **recognition** as it’s **prestigious** in terms of **style**. I affirm that the brand improves my **self-esteem** and reflects my young **personality**” (Procurement specialist, UK).*

*“In terms of **recognition**, I would say yes. Samsung gives me a **sense of pride** as I feel **part of an elite group**. Also, Samsung Smartphones are of **high quality** and that represent my personality as I pay much attention to detail” (Security officer, UK).*

*“Yes, all my friends in my **social network are on FaceTime** and I feel that **sense of belongingness** when I connect with friends on FaceTime. But the iPhone brand has no reflection on my personality” (International Courier owner, UK).*

*“Yes it gives me **recognition**, because the Apple phone is generally **not the Smartphone for everyone** – thus the recognition. The Apple product line adds the **uniqueness to my personality**” (Commercial officer, Ghana).*

*“Yes, the Samsung brand provides me with **recognition** as they produce **quality, durable** and **easy to use** Smartphones. However, I don’t think it reflects my **personality**” (Healthcare assistant, UK).*

“Yes, iPhone gives me **recognition** as the brand is a **market leader** in the Smartphone industry, hence it’s **prestigious** to be **among the users of this phone**. Almost all my **friends and colleagues at work use the iPhone** so it is much easier to be on the FaceTime **social network**. iPhone represents **quality** and as an individual, I feel the Smartphone I use must **reflect my personal self traits**” (Insurance underwriter, Ghana).

“Being an iPhone user, I **derive recognition** and **self-esteem** from it. My company is an IT firm and we understand the need to have a **top of the range Smartphone** which has the **ability and functions** to support our work. The senior managers and executives are provided a free iPhone; it’s a **corporate culture now**. It’s **prestigious** to have a free iPhone at work as it indicates seniority and promotion. Personally, I am well organised and the iPhone represents a **good image of myself**” (IT consultant, Ghana).

The factors identified here are: **recognition, corporate culture, prestige, good image, prestigious, social network, reflects my personality, belongingness, smart, elite group, unique brand, reflects young personality, self-esteem, self-concept**.

These were further compared with other data in relation to Questions 9 and 10, and those that were identified as bearing some relation to a common theme were grouped together to form concepts. The subsequent categories are shown below in Figure 7.1.

Figure 7.1 Categories, properties and dimensions

Category	Self-Congruence
Emerging Concepts	<i>recognition, corporate culture, prestige good image, prestigious, social network reflects my personality, belongingness, smart, elite group, unique brand, self- esteem, self-concept</i>
Properties	<b>Self-concept</b>

	<b>Self-esteem</b>  <b>Belongingness</b>  <b>Prestige</b>
<b>Dimensions</b>	Positive      Negative

In relation to the **Questions 11 and 12**, respondents were asked how satisfied they were with their current Smartphone in terms of its quality and functions. The following are a sample of views expressed by participants to illustrate how the *concepts and categories emerged through the process of coding*.

*“Very satisfied with the **quality and durability**. It has **lots of functionalities** and gives me a **level of freedom** which allows me to do my work **efficiently**”* (Teacher, UK).

*“**Very satisfied** in terms of **quality** and extremely satisfied. The **functions help** me carry out work from home”* (IT consultant, Ghana).

*“**Highly satisfied**, especially with the **durability**. It does not break easily, very compact and doesn’t pick up a virus easily. Also I am **very satisfied** with **its unique** applications. It is the best on the market”* (Insurance underwriter, Ghana).

*“Very satisfied with the quality. **I got used to the brand** and **find it very hard to change**. It is **user-friendly** and has functions and Apps such as FaceTime that are **convenient for** reaching friends”* (Accountant, UK).

*“**Satisfied** apart from its short battery life”* (Chartered logistician, Ghana).

*“Very **satisfied**. Built to **handle my needs**”* (Lecturer, UK).

*“**Satisfied** with **quality** of iPhone. **Functions are easy to use**, and has **many features** which other brands don’t have”* (Healthcare assistant, UK).

*“Samsung has very **good quality**. It has high **picture quality**, excellent **speed** and prompt notification for **periodic updates**”* (Banking professional, Ghana).

The factors identified here are: **quality, periodic updates, many features, built to handle needs, used to the brand, hard to change, user-friendly, convenient,**

***durability, unique, functions help, lots of functionality, efficiency, level of freedom.***

These respondents were compared with other feedback in relation to Questions 11 and 12, and those identified as bearing some relation to a common theme were grouped together to form higher commonality, or sets of concepts. The concepts discovered were grouped into a category through the process of open coding. The coding process is followed for all survey questionnaires to identify the emergent concepts and categories based on the responses which are identified below in Figure 7.2.

**Figure 7.2 Categories, properties and dimensions**

<b>Category</b>	<b><i>Functional Utility maximisation</i></b>
<b>Emerging Concepts</b>	<i>efficiency, level of freedom, satisfaction, quality, periodic updates, user-friendly, many features, familiar with brand, hard to change, durability, unique functions help, lots of functionality</i>
<b>Properties</b>	<b><i>Perceived quality</i></b>  <b><i>Customer Satisfaction</i></b>
<b>Dimensions</b>	<i>Low      High</i>

In relation to **Question 13**, respondents were asked how distinct their Smartphone is from other Smartphones.

*“The Samsung is **user-friendly** and hence **popular**”* (Student, UK).

*“I have used Samsung for a while now, and its **unique features** and functions are very **distinctive**”* (Army officer, Ghana).

*“My HTC Smartphone offers me a wide range of **distinctive** functions, which I believe is very good” (Librarian, Ghana)*

*“Yes, iPhone’s operating system (**iOS**) is **unique** to only the brand” (Finance executive, UK).*

*“With HTC the **functions are different** and its operating system is too” (Security officer, UK).*

*“It is **peculiar from others** because the iPhone always **stands out** with its functionalities and it’s always a **pacesetter**” (Procurement specialist, UK).*

*“Nokia Smartphone is **not distinct** as most **phones do similar things** these days” (Pharmacist, UK).*

*“Very distinct, the functions are **unique** and the **iOS exclusive** to only iPhone users. Also it’s FaceTime, a video calling function and **design exclusive to iPhone**” (IT consultant, Ghana).*

*“Nokia is a very **good and distinctive** but **user-friendly**, it allows me to use different apps and the **picture quality** is great too” (Merchant navy officer, Ghana).*

The factors gathered from the above data are: **Unique, Operating system (OS), exclusive, design exclusive, pacesetter, user-friendly, popular, peculiar, functions are different.**

These were further compared with other responses in relation to Question 13 and those that related to a common theme were grouped together to form higher commonality concepts. The concepts discovered were then grouped into a category through the process of open coding and the finding is presented in Figure 7.3 below.

**Figure 7.3 Categories, properties and dimensions**

<b>Category</b>	<b>Brand Distinctiveness</b>
<b>Emerging Concepts</b>	<i>unique, operating system (OS), exclusive, design exclusive, pacesetter, user-friendly, popular, peculiar, familiar, functions are different</i>
<b>Properties</b>	<b>Uniqueness</b>





gether to form concepts. The concepts discovered were grouped into a category through the process of open coding and the response is shown in Figure 7.4 below.

Figure 7.4 Categories, properties and dimensions

<b>Categories</b>	<b>Brand Loyalty</b>
<b>Emerging Concepts</b>	<i>not at the moment, no I won't switch, not necessarily, not sure, not really, why not, I don't mind trying, I will change, opportunity, I will stick to current Smartphone</i>
<b>Properties</b>	<b>Brand switching</b>  <b>Attitudinal loyalty</b>  <b>Behavioural loyalty</b>
<b>Dimensions</b>	<i>High                      Low</i>  <i>Positive                Negative</i>

In relation to **Question 15**, respondents were asked if they would repurchase the same brand even if new Smartphones were launched by competitors. The following quotes represent a sample of the views expressed by respondents.

*“Yes I will **repurchase** because I got used to this brand and I will **not switch** and learning how to use a new phone from a different company” (Student, UK).*

*“I do not actually pay attention to newer versions of different brands as there are new brands very often on the market. I wish to always **upgrade the same brand**” (Bar operator, Ghana).*

*“No **I will not purchase** any other, because the IOS (the Apple software) is **unique** to only Apple unlike Android and others” (Unknown, UK).*

*“These new Smartphones launched basically perform the same functions, and are sometimes expensive. I will always repurchase the same brand” (Politician, Ghana).*

The incidents identified are: *repurchase, not switch, not purchase any other, unique.*

As with previous analyses, the incidents were further compared with other data in relation to Question 15 and those that bore relation to a common theme were grouped together to form concepts. The concepts below were discovered and grouped into categories as follows in figure 7.5.

### Figure 7.5 Categories, properties and dimensions

<b>Category</b>	<b>Resilience (New innovative Product)</b>
<b>Emerging Concept</b>	<i>not purchase, unique, repurchase, wouldn't like switching</i>
<b>Properties</b>	<b>Brand switching</b>
<b>Dimensions</b>	<i>High</i>  <i>Low</i>

Similarly, respondents to **Question 16** were asked if they would continue to buy the same brand of Smartphone regardless of price. The following quotes represent a sample of the views that were expressed.

*“Yes I will **repurchase irrespective of price** because of **guaranteed quality**”* (Commercial officer, Ghana).

*“Yes I will **continue to buy** even if there is a substantial **increase in price**, as far as it maintains its position as the **leading Smartphone**”* (Insurance underwriter, Ghana).

*“Yes I will **repurchase**. iPhone is priced for the **upmarket** which also **identifies** with a specific group of people (mostly professionals). This also prevents **fake brands** from penetrating the market”* (IT Consultant, Ghana).

*“Yes I will **repurchase**, because my Samsung is an essential **part of my life** and I will invest in the best phone for myself”* (Student, UK).

*“Yes I will **buy again** since I have **tried and tested** it to know it’s **good**”* (Banking professional, Ghana).

*“Yes I will **buy**, I feel some **commitment** to the brand as I said earlier. It’s **very durable**”* (Healthcare assistant, UK).

*“No, I will **not buy** again; I am concerned about **affordability**”* (Chartered logistician, Ghana).

*“Yes I will **buy again** because the brand indicates and delivers **quality**”* (Security officer, UK).

*“Yes I will **repurchase** because it provides all the **functions** I need, and I am **committed to the brand**”* (Teacher, UK).

The incidents identified above are: **repurchase, functions, quality, price, will buy again, affordability, very durable, tried and tested, guaranteed quality, good quality, continue to buy, identify, leading Smartphone, fake brands, part of my life, commitment.**

These were further compared with other responses in relation to Question 16 and those that related to a common theme were grouped together to form concepts. The concepts discovered were then grouped into categories through the process of open coding as indicated in Figure 7.6 below.

Figure 7.6 Categories, properties and dimensions

Category	Resilience (Competitive Pricing)
Emerging Concepts	<i>repurchase, functions, quality, price will buy again, affordability, very durable tried and tested, guaranteed quality good, continue to buy, identify, leading Smartphone, fake brands part of my life, commitment</i>
Properties	<b>Commitment</b>
Dimensions	<i>High</i>  <i>Low</i>

Finally, in **Question 17**, respondents were asked if they would recommend their current brand of Smartphone to friends. The following quotes represent a sample of the views expressed by respondents.

*“Yes **I will recommend**, all because of iPhone’s all round **uniqueness**”* (Finance Professional, Ghana).

*“Yes, **I will recommend Samsung**, since **most of my friends** are in the same career as me and the **functions** the phone has help, especially for interactive learning”* (Teacher, UK).

*“If I have to recommend a Smartphone, it will definitely be iPhone”* (Sound technician, Ghana).

*“Yes, **I will recommend** as it helps when **your friends** use the same brand”* (Owner, International couriers, UK).

*“Samsung is fantastic and I will at any time recommend it to anyone (Army officer, Ghana)”*

*“Yes **I will recommend**, the brand is of **good quality** and **sets the user apart**”* (Security officer, UK).

*“Yes **I will recommend** because of its **distinctiveness** and **uniqueness**”* (Procurement specialist, UK).

*“Yes I will recommend, this is a **universal brand used by many**” (Accountant, UK).*

*“Yes I will recommend because it hardly gets infected with any virus and hardly ever malfunctions” (Chartered logistician, Ghana).*

*“Yes I will recommend, due to **satisfaction with previous experience**” (Lecturer, UK).*

*“Yes I will recommend, because I have **never sent this iPhone for repairs** for the past four years and never had a challenge with it” (Banking professional, Ghana).*

*“Yes I will recommend, because it’s the **best Smartphone with distinct features**” (Healthcare assistant, UK).*

*“Yes I will recommend as the iPhone is **durable** and the **positive image of the brand** is the best on the market” (Student, UK)*

The incidents identified are: ***Will recommend, positive image of brand, durable, best Smartphone, distinct features, never repaired, satisfaction, previous experience, universal brand, used by many, uniqueness, friends, distinctiveness, sets user apart, most of my friends, good quality, function.***

These were further compared with other data in relation to Question 17 and those that bore relation to a common theme were grouped together to form concepts. The concepts discovered were grouped into a category through the process of open coding as shown below in Figure 7.7.

**Figure 7.7 Categories, properties and dimensions**

<b>Category</b>	<b>Brand Advocacy</b>
<b>Emerging Concepts</b>	<i>will recommend, positive brand image durable, best Smartphone distinct features, never repaired satisfaction, previous experience universal brand, used by many uniqueness, friends, distinctiveness sets user apart, most of my friends good quality, function</i>

<b>Properties</b>	<i>Brand Image</i> <i>Word of mouth</i>
<b>Dimensions</b>	<i>Positive</i> <i>Negative</i>

In summary, using a grounded theory method of simultaneous comparison of concepts and their commonalities within the questionnaire responses, several concepts eventually emerged. A similar process was followed for the semi-structured questions identified below. Finally, a simultaneous comparison of the concepts and their commonalities across both the semi-structured interviews and the survey questionnaires will establish the open codes.

### 7.3 Analysis of Interview Data

In-depth semi-structured interviews were conducted after the survey was carried out. Interviews were conducted via Skype in order to gain access to participants across Ghana and the UK. In all, 14 participants (see appendix H), were interviewed and the proceedings of interviews were audio-recorded with the consent of participants (Nwanji, 2006; Sorour 2011; Ibrahim, 2013). The audio recordings were transcribed to ensure accuracy and verifiability. The duration of each interview was between 25 and 30 minutes.

The interview discussions were intended to elaborate upon, and shed more light on, the issues raised during the survey questionnaire phase that needed further clarification. The analysis of data collected from interviews further validated the open categories that emerged through open coding. Each interview had two sections. The first was mainly focused on an introductory discussion which was included to elicit per-

sonal information about interviewees, including their names and professional background. The second section centred around four main questions and the first of these related to brand prestige. This was followed by a question about self-congruence. The third question related to brand loyalty and the discussion concluded with a question about brand advocacy.

### **7.3.1 Brand Prestige**

The major feelings described in relation to this theme were pride in telling others, including family members, about involvement with the brand. In telling others about their use of a particular Smartphone, they signalled a particular self-image, and also reaffirmed this image to themselves.

*“... I feel proud and I also feel there’s an explanation piece as not everyone knows what the iPhone can do but I must say for the most part, say with my peers from my MBA school, there’s a great sense of pride on my part when I say I use the iPhone Smartphone”* (MBA student, University of Ghana).

*“... I am still very proud though to say I am a user of Samsung”* (Lab technician, UK).

*“... Proud, very proud. I hope actually the standard and the level of the iPhone Smartphone remains a market leader. I think it sets a really good example of how Smartphones should be across the world, I know it’s not like any other brand of Smartphone, I’ve used a lot of phones but I think the iPhone sets a standard for what Smartphones should offer and that’s really important for me”* (Business analyst, UK).

*“... It makes me feel proud to be part of the Samsung family, which offers the utmost service for its users, one which is really very sophisticated in what it does”* (Entrepreneur, Ghana).

*“... Oh yes, extremely proud. Every time I see a Samsung, something goes off in my head because I personally feel a little part of the brand. I feel proud that I took part in the product launch and I take a lot of pride in the Samsung brand”* (Customer service assistant, UK).

*“I have used iPhone Smartphones for some time now. I have recommended it to my family who are very proud users of the brand”* (IT consultant, Ghana).

*“... I think the fact that Apple is a strong brand makes me proud of the brand. Whenever I talk to friends about the brand I always tell my user experience with a lot of*



*pride. Apple is a consumer-focused brand and they really look at consumer interest to design products. I'm proud of Apple, very proud"* (Store Manager, UK).

The prestigious component of brands not only serves as an external signal, but it also establishes and reaffirms the consumer's self-concept and identity (Belk, 1988; Fournier, 1998) thus eliciting a self-signalling effect (Chernev et al., 2011). All of the above responses from the interviews illustrate how participants feel a great sense of pride in using the iPhone brand, and working for the company. For consumers, identity-prestige enables them to view themselves in the reflected glory of the brand, which enhances their self-worth. Evidence here from participants similarly suggests the brand also satisfies their particular self-definitional needs.

Consumers also indicated that they would only want to buy a brand which has a certain prestige, as opposed to a brand with very little prestige. The desire for association with an in-group (i.e. prestige) can be observed here, as opposed to an association with an out-group (less prestige). In the same way, consumers have stronger self-brand connections to brands which are associated with an in-group than those brands which are inconsistent with an in-group. There are signs of weaker self-brand connections to brands associated with an out-group than to brands inconsistent with an out-group (Escalas and Bettman, 2005). In a similar fashion, Kwame expresses his desire to associate with the in-group rather than the out-group. The brand serves as a vehicle for enhancing his self-esteem and self-worth in that he seeks the prestige and extra confidence.

### **7.3.2 Self-Congruence**

Brands are frequently used by consumers to express and to validate their identity (Aaker, 1997; Berger and Heath, 2007; Escalas and Bettman, 2005). Research has

shown that the value of brands is assessed by the extent to which they reiterate consumer principles or beliefs (Kleine et al., 1993; Levy 1959; Solomon 1983). Brands can be used to communicate knowledge of culture, status, taste and style and/or membership of a particular social or professional group (Amaldoss and Jain, 2005; Twitchell, 2002, Braun and Wicklund, 1989; Escalas and Bettman, 2005; Wicklund and Gollwitzer, 1981).

The brand as a symbol of a consumer's self-concept provides symbolic benefits by providing a vehicle for self-expression (Aaker, 2009). Consumers who participated in the interviews described certain congruencies which they felt existed between the brand and their own culture or origin and between their family and their own values. Some informants described feeling a connection to the brand as a result of such congruence.

*“Apple is not just about making money, they are about making a difference, so I think that’s what drives my connection with the brand and it is vital”* (Dentist, Ghana).

Ricky is able to connect with the brand since it reminds him of his own duty to ensure the well-being of his patients. Connections with brands may be at an individual level (described as a self-concept connection), for example as a contribution to one's own identity, or, as is apparent here, at a group level (e.g. country-of-origin connection) such as in a contribution to one's group identity (Swaminathan et al., 2007). Since the origin of the brand lies in its quality values, Ricky is able to relate to the brand in this context. More specifically, connections with brands may be made as a consumer seeks autonomy or as he/she seeks group affiliation.

Berry (2000) suggests that “brands that connect with the emotions of customers are those that reflect their core values”. In other words, customers connect with brands if

the brand values reflect their own values. Interviewees spoke of the congruence between the perceived values of the iPhone brand and their own values, and of the importance of such congruence. For instance, a respondent claims she would not fit in if her values did not match those of the brand:

*“Definitely there is overlap between my own values and those of Samsung. I wouldn’t like using a Smartphone of poor quality. I wouldn’t like it because that wouldn’t match my values”* (Lab technician, UK).

Similarly, another respondent expresses how important value congruence is to her:

*“As a web designer I use my creativity to design excellent websites for my clients. I take pride in doing this and in what I do as a web designer so it is important to me that I use and identify with a Smartphone that has the same values as I do. I value the same things that the iPhone does”* (Web designer, Ghana).

One participant makes reference to social networking reflects how he perceives the iPhone brand as having similar or the same values as those of their users connected on its FaceTime application.

*“I’m social-oriented person, I’m close to my friends and that’s what the ‘FaceTime app’ seeks to promote. I grew up in a very tight-knitted community in Accra, we’re very close, they raised me with good values, to be a good person, to do the right thing, to be a good citizen by being very collaborative and sociable”* (Student, Ghana).

Implicit in these self-congruence statements is the observation that the brand serves as a vehicle for expressing components of self, such as personal, family and cultural values (McCracken, 1993).

### **7.3.3 Brand Loyalty**

In response to the question pertaining to brand loyalty, some of the informants spoke of their loyalty to a particular brand of Smartphone:

*“You know, I have a sense of loyalty with iPhone, I have been a user of this Smartphone for five years now. I have colleagues who have used this brand for twelve years. I’m actually called the newcomer sometimes”* (Banker, UK).

*"I am loyal but not more than that. I am thoroughly engaged, I would say I'm in love with the brand"* (Lab technician, UK).

The loyalty evident in the responses above was not found to be consistent across all accounts, as explains as participant:

*"I'm loyal, however if something better comes along I'll try it, I may go back to the original if that's the one I feel comfortable with and I feel that same way with my current iPhone too. If I had a better offer that was maybe sophisticated or different that I thought would be better, then I would try it"* (News editor, Ghana).

### **7.3.4 Brand Advocacy**

Just as brands create functional and emotional value for consumers (de Chernatony et al., 2011), customers co-create value through their interactions with brands (Schau and Gilly, 2003; Aaker, 2010). One form of value creation by customers is brand advocacy. Consumers become 'brand advocates' when they are highly involved with a brand, and offer invaluable positive word-of-mouth (WOM) recommendations about the brand to others (Wragg, 2004). In response to the question of brand advocacy, respondents had the following to say:

*"Definitely, I will recommend the iPhone to my peers and my family members because I can testify that it is durable and has a positive image"* (MBA student, University of Ghana).

*"Yes, I will recommend to my colleagues anytime, it's the best Smartphone so far, especially with its special features"* (Lab technician, UK).

*"Sure! I will recommend. I must confess that I am absolutely satisfied with my Samsung. What an experience"* (Business analyst, UK).

*"I have used Samsung Smartphones for some time now. I have recommended it to my family who are very proud users of the brand"* (Entrepreneur, Ghana).

## 7.4 Discussion of Open Categories

The following sections provide a detailed description of each open category based on participants' thoughts and views as they relate to the issue of brand loyalty and switching behaviour from an identity theory perspective. The seven open categories comprise:

- |   |   |
|---|---|
| 1) <i>Self-Congruence</i>                 | 5) <i>Resilience (New Innovative Product)</i> |
| 2) <i>Functional Utility maximisation</i> | 6) <i>Resilience (Competitive Pricing)</i>    |
| 3) <i>Brand Distinctiveness</i>           | 7) <i>Brand Advocacy</i>                      |
| 4) <i>Brand Loyalty</i>                   |   |

## 7.5 Self-Congruence

Self-congruity refers to how much a consumer's self-concept is congruent with the personality of a typical user of the brand. Brand personality can be described as the set of human characteristics that may be linked with a particular brand (Aaker, 1997; Sirgy et al., 1991; Da Siveira et al., 2013; Wang and Yieh, 2016). Consumers incline towards those brands that have similar personality traits to themselves. Individuals are driven by a need to feel good about themselves, and try to maintain as well as enhance their own self-esteem (Malär et al., 2011). One way towards achieving this is to consume brands that are congruent with one's own view of self or ideal self (Sirgy, 1982). Indeed, brands may be viewed as a system of signs in the construction of the self (Schembri et al., 2010). Consumers evaluate the symbolism of the brand and determine whether it is appropriate for their 'selves' (Ahuvia, 2005; Belk, 1988; Schouten, 1991; Da Siveira et al., 2013; Wang and Yieh, 2016). This was confirmed by Ricky when he observed:

*"... Apple is not just about making money, they are about making a difference so I think that's what drives my connection with the brand and it is vital"* (Dentist, Ghana).

By owning brands which consumers perceive to possess symbolic images that are congruent with certain elements of their own self-concept, consumers maintain or strengthen their self-concept (Dolich, 1969). As an extension of this ownership, consumers are also able to express their own identities in that the brands they choose bear images similar to their own self-image (Aaker, 1999; Sirgy, 1982). Consistent with this view, such ownership leads to long-lasting connections and relationships with those brands that have values and personality associations which are congruent or in line with people's self-concept (Sirgy, 1982). The subsequent brand relationships can therefore be viewed as expressions of consumers' identities (Swaminathan et al., 2007). The psychological comparison involving the interaction between the product-user image and the consumer's self-concept creates a subjective experience called self-image congruence, and this considered an important predictor of consumer behaviour (Aaker, 1997; Sirgy et al., 199; Da Siveira et al., 2013; Wang and Yieh, 2016). This is evidenced in the comments below:

*"Definitely there is overlap between my own values and those of Samsung. I wouldn't like using a Smartphone of poor quality. I wouldn't like it because that wouldn't match my values"* (Lab technician, UK).

The greater the congruence between brand personality and self-concept, the more likely the consumer is to exhibit a favourable attitude towards to the brand (Kuenzel and Halliday, 2010). It is widely held that self-congruity explains consumer preferences, since they seek products and brands with higher self-congruity over those with lower self-congruity (Helgeson and Supphellen, 2004). According to Puzakova, Kwak and Rocereto (2009), self-concept/brand image congruity is defined as "the level of congruity between key elements of one's own self-concept and brand im-

age". It follows that consumers evaluate brands such that if they perceive there to be a level of congruence between the brand image and their self-concept, they are more likely to exhibit higher levels of both brand preference and brand loyalty (Hong and Zinkhan, 1995). Other researchers (Sirgy et al., 1997, 1991; Jamal and Goode, 2001) validate this idea, suggesting that customer behaviours in the form of positive word-of-mouth and brand attitudes also develop as a result of self-concept/brand image congruency. Self-image congruence has also been shown to influence brand satisfaction (Sirgy et al., 1997; Aaker, 1997; Da Siveira et al., 2013; Wang and Yieh, 2016).

#### **7.5.1 i) Self-concept**

Burke and Stets (2009) explain that the self originates in the mind of a person and is that which characterises an individual's consciousness of his or her own being or identity. They hold the view that the self has the ability to take itself as an object; to regard and evaluate and take account of itself and plan accordingly. It manipulates itself as an object in order to bring about future states. McCall and Simmons (1978, p. 52) observe, "The individual achieves selfhood at that point at which he first begins to act towards himself in more or less the same fashion in which he acts towards other people."

Consistent with McCall and Simmons' position on the self, Mead (1943) shares the same view that "The self is something which has a development, it is not initially there at birth, but arises in the process of social experience and activity, that is, develops in the given individual as a result of his relations to that process as a whole and to other individuals within that process". According to Mead (1934), the "self"

grows out of the mind as the latter interacts with its environment to solve the problem of sustaining the biological organism (person) that holds it.

To elaborate on the above, Burke and Stets (2009) insist that the self is able to be both subject and object; thus, paradoxically, as the “self” evolves uniquely as an object, there is, at the same time, a blend of perspectives of the self and others with whom we interact. Hence, the self is both individual and social in its character, an opinion shared by Burke and Stets (2009). This is seen in the feedback below:

*“Yes because I will recommend since most of my friends are in the same career as me and the functions the phone has help, especially for interactive learning”* (Teacher, UK).

*And*

*“Yes, I will recommend as it helps when your friends use the same brand”* (Owner, international couriers, UK).

*“Oh yes I will recommend always, if I am asked to make recommendations in that respect”* (News editor, Ghana).

Because the self emerges in social interactions within the context of a complex, differentiated society, McCall and Simmons (1978, p. 52) point out that “the Individual achieves selfhood at the point at which he first begins to act towards himself in more or less the same fashion in which he acts towards other people”. This reflexive behaviour is the core of the self, and enables the self to be both subject and object.

Overall, representation and the objective world encompass two extremes. One extreme is, knowing the subject without a world context, and the other is to know the external world without the subject. These are in fact one and the same thing considered from two opposite points of view (Schopenhauer, 1966). According to Howell



(2013) the distinction between subject and object may also be considered when we identify others in the world. This is accepted through undertaking data collection.

The self needs an objective acknowledgment of its own self in order to generate an understanding of what reality (for itself) entails. Other humans only can provide this, through reflecting consciously a sense of their own external being. In this context, Howell (2013) concludes that objective truth lies in mutual recognition; thus the recognition of others in the world. Others define “self” and “self” defines “self” in relation to the definition of “others”. Community defines “self” and “self” defines community.

### **7.5.2 ii) Self-esteem**

Gardner and Levy (1999) and Levy (1959) expressed the more profound view that the consumer realities which influence and stimulate individual purchase decisions are mainly based on individual consumers’ subjective ideas of brand and their perceived reality, rather than objective reality or the product or service. The comments below are relevant here:

*“Being an iPhone user, I derive recognition and self-esteem from it. My company is an IT firm and we understand the need to have a top of the range Smartphone which has the ability and functions to support our work. The senior managers and executives are provided a free iPhone; it’s a corporate culture now. It’s prestigious to have a free iPhone at work as it indicates seniority and promotion. Personally, I am well organised and the iPhone represents a good image of myself”* (IT consultant, Ghana).

Such perceived reality as indicated by the respondent above is not based on the functional attributes of a brand alone. This is particularly so as the selection of brand attributes takes place based on utilitarian functions (Carpenter et al., 1997; Appiah & Ozuem, 2017). Such a process is beyond the technical skills of consumers. Rather,

everything people associate with a brand, intrinsic and extrinsic, contributes to what consumers purchase. In the same vein, Penrose (1995, p. 83), refers to a package of psychological promises bundled within a product or service on offer to the consumer. Another respondent's comment resonates with this:

*"In terms of recognition, I would say yes. It gives me a sense of pride as I feel part of an elite group. Also, Apple phones are of high quality and that represents my personality as I pay much attention to detail"* (Banker, UK).

King (1973) provided a more in-depth analysis of brands as the epitome of the marketing process. He further explained that a product or service is what a firm manufactures or offers, whilst a brand is what the consumer buys, and what makes the company succeed. While the product is the intrinsic element of the brand, it represents the basic element in a whole article to which the consumer attaches value. This subjective belief held by customers represents the essence at the heart of brand.

This is explained further in terms of the "psychological values" brought to bear on enhancing the functional benefits of a brand beyond its utility capacity (Levy, 1997; He et al., 2012; Kumar and Shah, 2004; Ozuem et al., 2016). This psychological value is embodied in the complex variety of 'soft' attributes and other associations that determine the desirability of purchasing a particular brand instead of its alternatives (He et al., 2012; Kumar and Shah, 2004). These subjective attributes embody the values over and above the basic product that a brand provides to consumers.

### **7.5.3 iii) Belongingness**

In their conceptualisation of CBI, Lam et al. (2010, 2013) suggest that the brand serves as a relationship partner to both the "private self", i.e. such that individuals

use the brand to define who they are, and the “social self”, such that individuals consider themselves part of an in-group identifying with the brand. This was evidenced in the following comments from respondents:

*“In terms of recognition, I would say yes. It gives me a sense of pride as I feel part of an elite group. Also, Apple phones are of high quality and that represents my personality as I pay much attention to detail”* (Banker, UK).

*“... I’m socially oriented person, I’m close to my friends and that’s what the ‘FaceTime app’ seeks to promote. I grew up in a very tight-knitted community in Accra, we’re very close, they raised me with good values, to be a good person, to do the right thing, to be a good citizen by being very collaborative and sociable”* (Student, Ghana).

And

*“Yes, all my friends in my social network are on FaceTime and I feel that sense of belongingness when I connect with friends on FaceTime. On the other hand, the brand has no reflection on my personality”* (International courier owner, UK).

CBI is a psychological state that goes beyond just the cognitive overlap between the brand and the self. It also includes the affective and evaluative facets of psychological oneness with the brand. It can be argued that CBI exists at a higher level of abstraction than the less abstract concept of self-brand congruity (Lam et al., 2012). More specifically, CBI is a consumer’s psychological state of feeling, perceiving and valuing his or her belongingness with his or her preferred brand, which refers to CBI as a formative idea made up of three dimensions, namely emotional, cognitive and evaluative.

Belongingness refers to the psychological oneness resulting from an actual membership or a symbolic membership such as that of a user of the brand. In accordance with Stokburger-Sauer et al. (2012), who concur with the three aforementioned components, CBI may be more extensively defined as how a brand is assimilated into a

person's self-concept by improvements to a person's cognitive connection and emotional attachment to a particular brand. As a result of self-categorisation, a cognitive connection is formed between the individual and the brand. The evaluative component is the degree to which consumers value their connection with the brand, and the value placed on this connection by others. More specifically, it describes the consumer's feelings towards the brand, and towards others' evaluations of the brand. The emotional component is the emotional attachment to the group, and to the evaluations associated with the group.

#### **7.5.4 iv) Prestige**

The prestigious component of brands not only serves as an external signal, but also establishes and reaffirms the consumer's self-concept and identity (Belk, 1988; Fournier, 1998). It thus has a self-signalling effect (Chernev et al., 2011). All of the above responses from interviewees illustrate how participants feel a great sense of pride in using a specific brand, and also in working for the company. For consumers, identity prestige enables a view of the self in the reflected glory of the brand which enhances their self-worth. Evidence here from participants similarly suggests that the brand also satisfies their particular self-definitional needs.

*"Yes, it gives me recognition as the brand is a market leader in the Smartphone industry, hence it's prestigious to be among the users of this phone. Almost all my friends and colleagues at work use the iPhone so it is much easier to be on the FaceTime social network. iPhone represents quality and as an individual, I feel the Smartphone I use must reflect my personal self traits"* (MBA student, Ghana).

*"Yes, the iPhone brand provides recognition as it's prestigious in terms of style. I affirm that the brand improves my self-esteem and reflects my young personality"* (Teacher, UK).

Participants who took part in the in-depth semi-structured interviews shared the following opinions:

*“... It makes me feel proud to be part of the Samsung family, which offers the utmost service for its users, one which is really very sophisticated in what it does” (Entrepreneur, Ghana)*

*“... Oh yes, extremely proud, every time I see a Samsung phone something goes off in my head because I personally feel a little part of the brand. I feel proud that I took part in the product launch and I take a lot of pride in the Samsung brand” (Customer service assistant, UK).*

*“I think the fact that Apple is a strong brand makes me proud of the brand. Whenever I talk to friends about the brand, I always tell my user experience with a lot of pride. Apple is a consumer-focused brand and they really look at consumer interest to design products. I’m proud of Apple, very proud” (Manager, UK).*

## **7.6 Functional Utility Maximisation**

The functional benefits of brands are often product-oriented, satisfying immediate and practical needs. Such benefits are often associated with solving or avoiding problems (Keller, 1993; Seiders and Tigerts, 1997). Functional benefits, particularly those based on attributes, link directly to consumer decisions but are not without their limitations, since they fail to differentiate, and moreover are easily replicated (Aaker, 1996). Functional congruity in consumers is led by utilitarian motives and expresses the extent to which the functional attributes of the brand match the expectations of the consumer in terms of how the product should perform, to accomplish the main goal of the product (Kressman et al., 2006). For example, a banking professional based in Ghana noted:

*“Very good quality. It has high picture quality, excellent speed and prompt notification for periodic updates” (Web designer, Ghana).*

While a teacher from the UK had this to say:

*“Very satisfied with the quality and durability. It has lots of functionalities and gives me a level of freedom which allows me to do my work efficiently” (Teacher, UK).*

Similarly an IT consultant shared the view below:

*“Very satisfied in terms of quality and extremely satisfied. The functions help me carry out work from home”* (IT consultant, Ghana).

The greater the functional congruity as perceived by the consumer, the more likely they are to identify with the brand. This is confirmed by the following respondent:

*“Very satisfied with the quality. I got used to the brand and find it very hard to change. It is user-friendly and has functions and Apps that are convenient for reaching friends”* (Business analyst, UK).

Brand loyalty is also an outcome of the functional utility of a brand as derived by the consumer (Bhattacharya et al., 1995). The widely studied concept of utilitarian value is described as instrumental (i.e. functional and task-related) and primarily related to cognitive evaluation on the part of the consumer. Utilitarian value is linked with the notion of product performance and usefulness (Mano and Oliver, 1993; Seiders and Tigerts, 1997). For example, savings, convenience and product quality are classified amongst utilitarian values or benefits (Chaudhuri and Holbrook, 2001; Ailawadi et al., 2001).

### **7.6.1 i) Perceived Value**

Lam et al., (2013) explains that relative perceived value is the degree at which the utilitarian value of the functional attributes of a product surpasses a substitute in the similar product category. At the point when consumers experience problems generating positive information on a selected brand, it is believed that they possibly could infer that the amount of positive data may rather limited, and could negatively affect their attitude towards their preferred brands (Wänke, Böhner and Jurkowitsch, 1997). Considering its significance to functional utility, relative perceived value influences switching behaviour as functional utility maximisation. Respondents claimed:

*“Very satisfied with the **quality and durability**. It has **lots of functionalities** and gives me a **level of freedom** which allows me to do my work **efficiently**”* (Teacher, UK).

*“**Very satisfied** in terms of **quality** and extremely satisfied. The **functions help** me carry out work from home”* (IT consultant, Ghana).

*“**Highly satisfied**, especially with the **durability**. It does not break easily, very compact and doesn’t pick up a virus easily. Also I am **very satisfied** with **its unique** applications. It’s the best on the market”* (Student, Ghana).

*“**Satisfied** apart from its short battery life”* (Dentist, Ghana).

*“**Satisfied** with **quality** of Samsung Smartphone. **Functions are easy to use**, and it has **many features** which other brands don’t have”* (Lab technician, UK).

*“Very **good quality**. It has high **picture quality**, excellent **speed** and prompt notification for **periodic updates**”* (News editor, Ghana).

### 7.6.2 ii) Customer Satisfaction

Customer satisfaction refers to “the summary psychological state resulting when the emotion surrounding disconfirmed expectations is coupled with the consumer’s prior feelings about the consumption experience” (Oliver, 1981; Bennett and Rundle-Thiele, 2002). Consistent with this view, Shankar et al. (2003) and Bennett and Rundle-Thiele (2002) define satisfaction as the perception of the pleasurable fulfilment of a service or product. Respondents shared the following views in relation to this:

*“**Satisfied** apart from its short battery life”* (Dentist, Ghana).

*“**Very satisfied**. Built to handle my needs”* (Teacher, UK).

*“**Satisfied** with quality of Samsung. Functions are easy to use, and it has many features which other brands don’t have”* (Business analyst, UK).

*“To talk about satisfaction is to talk about total satisfaction from my Smartphone. The functions are absolutely brilliant”* (Student, Ghana).

Consumer satisfaction is not only cognitive but also emotional (Rodriguez del Bosque and San Martin, 2008; Albert and Merunka, 2013). Customers are happy

with a product offering when brand identification augments their positive image especially within social groups, or if such consumers derive a sense of belonging within that social group (Ferreira, 1996; Kim et al., 2001). Earlier research indicate that brand identification encourages symbolic relations, emotional bonding and brand loyalty. Typical instance is given of Peter and Olson (1993) when they revealed that 94 per cent of buyers of Harley-Davidson are emotionally attached to the brand, as they do not only enjoy the quality of the motorbike, but additionally derive some amount of joy being part of a community, and so establish their loyalty. Based on this assumption, the current study proposes that the consequences of a sturdier consumer identification with a selected brand is greater consumer satisfaction.

Satisfaction is theoretically referred to as an affective-oriented assessment of the services provided and, as such, it is the emotive aspect of loyalty (Bourdeau, 2005; Cronin et al., 2000; Oliver, 1999), when deciding whether to switch to a competing retailer, customers are often guided by their feelings of satisfaction/dissatisfaction with the retailer (Hofmeyr & Rice, 2000; Albert and Merunka, 2013).

Solomon (2002) posits brands and brand settings provide an expression of lifestyles since lifestyles consist of consumption patterns, shared values and tastes. The greater the extent a brand image fits in a consumer's individual lifestyle, the greater the consumer's satisfaction with the brand experience. Drawing from this, lifestyle branding, may be referred to as a social state that propel individuals to purchase offerings that are linked to a peculiar lifestyle. Consequently, lifestyle marketers must have the intention to build consumer satisfaction with brands by creating brands that equals their lifestyle (Foxall et al., 1998; Solomon, 2002; Badrinarayanan and Laverie, 2011; He et al., 2012; Yeh et al., 2016).



Consumer satisfaction and brand loyalty are linked according to previous studies (e.g. Back and Parks, 2003; Albert and Merunka, 2013), whilst Rust and Zahorik (1993) proves that there exist a connection between consumer satisfaction and brand loyalty in the retail industry. As stated by a respondent:

*“Very satisfied with the quality. I got used to the brand and find it very hard to change. It is user-friendly and has functions and Apps that are convenient for reaching friends”* (Lab technician, UK).

McDougall and Levesque (1994) also support the above argument, and suggest that customer satisfaction positively impacts on loyalty in diverse service sectors, henceforth, consumer satisfaction with brand experience positively impacts on brand loyalty (Albert and Merunka, 2013; Hofmeyr and Rice, 2000).

## **7.7 Brand Distinctiveness**

According to Murphy, while a brand is made up of different constituents of both tangible and intangible elements, it is not simply the sum of the individual parts that it comprises. Therefore, “any attempt to analyse the whole by breaking it down to its molecular components” (Murphy, 1992, p. 2) will not adequately capture the concept. Brand, therefore, acts as a gestalt in that it is a concept that is more than the sum of its parts. These parts may have developed out of numerous scraps of information that it has established in the minds of consumers.

For a brand to establish a different pattern of beliefs and values that consumers internalise as a gestalt (Solomon, 2002), it needs to offer credible, coherent and attractive value propositions over time (Chaplin and John, 2005). For Murphy (1992, p. 3), a brand represents a relational pact that is effective, stating that it is a “pact between the owner and consumer to shop with confidence in an increasingly complex world

and it provides the owner with higher volume, often higher margins and greater certainty as to future demand”.

In keeping with the notion that a brand embodies many parts, Keller (1998, p. 4) defines brands as “a product, then, but one that adds other dimensions to differentiate it in some way from other products designed to satisfy the same needs”. The response below from participants resonates with this notion:

*“The functions are different and its operating system too”* (Customer service assistant, UK).

*“It is peculiar from others because the iPhone always stands out with its functionalities and it’s always a pacesetter”* (IT consultant, Ghana).

### **7.7.1 i) Uniqueness**

In terms of the gestalt analogy made by Murphy (1992), one can argue that this differentiation and satisfaction dimension is also part of what makes a brand. However, it does not explain the whole brand because the uniqueness of a physical composition (product) and its presentation may not explain the concept of the entire brand. Keller (1998) and Chaplin and John (2005) went on to observe that brands tend to create uniqueness through perceptions in the mind of the consumer and there is no other brand quite like a successful brand. Respondents shared how they perceived the iPhone as unique below:

*“The iPhone is user-friendly and hence popular”* (MBA student, Ghana).

*“Yes, its operating system (iOS) is unique to only the brand”* (Teacher, UK).

*“Very distinct, the functions are unique and the iOS is exclusive to only iPhone users. Also it’s FaceTime, a video calling function, and design exclusive to iPhone”* (IT consultant, Ghana).

If differentiation of the physical product does not represent the whole brand, what explanations can one have for the concept of brand? It is right to define brand as the product or service that a particular firm is offering to customers in the marketplace, and that such a brand is differentiated by its name, presentation and the uniqueness of its compositions. However, it is erroneous to assume that this is all there is to explaining the essence of brand. This is because, with increasing technological and manufacturing sophistication, many brands competing in the same product category can be produced to a virtually identical specification. This in turn can create parity among brands in the same product category, as clearly identified by the following respondent:

*“Not too distinct as most phones do similar things these days”* (News editor, Ghana).

With such a possibility, one cannot assume that the uniqueness of composition and presentation makes a brand. This, by itself, would suggest that there are many other factors that come together to explain a brand.

## **7.8 Brand Loyalty**

A reputable brand is influential in building a sustainable competitive advantage (Mizerski and Soh, 2012; Aaker, 1995; Bhattacharya and Lordish, 2000). The move to a relationship marketing paradigm lays much emphasis on brand loyalty as key indicator of customer relational strength (Oliver, 1999; Thomas and Lancaster, 2016; Giovanisa and Athanasopouloub, 2018). Brand loyalty is a “deeply held commitment to rebuy or re-patronise a preferred product or service consistently in the future, causing repetitive same-brand or same-brand-set purchasing, despite situational influence and marketing efforts having the potential to cause switching behaviour” (Oliver, 1999, p. 34). In view of this, one respondent posited:

*“I will stick to iPhone, because I used an Android phone before iPhone, and I realised that in terms of manoeuvrability and accessibility of the functions of the phone, iPhone is unique”* (Security officer, UK).

Dimitriadis (2006) shares a similar view by stating it is widely accepted that satisfied consumers are less sensitive to price changes, less influenced by competitor attacks, and more loyal to the firm longer than dissatisfied customers. Responses from the interviews that can be identified within this argument are as follows:

*“You know, I have a sense of loyalty with iPhone, I have been a user of this Smartphone for five years now. I have colleagues who have used this brand for twelve years. I’m actually called the newcomer sometimes”* (Banker, UK).

*“... I am loyal but not more than that. I am though engaged, I would say I’m in love with the iPhone brand”* (International courier owner, UK).

In line with all of the above definitions, loyalty to a brand is expressed due to a positive attitude, which makes a consumer repeatedly demand goods or services of a particular brand or a limited number of brands within a suitably defined period of time. Consistent with this view, Copeland (1923) shared the opinion that consumers may possess a strong attitude, which can have a strong effect on their behaviour towards a particular brand. He refers to this phenomenon as brand insistence. He further described brand insistence in terms of recognition, preference and insistence.

### **7.8.1 i) Attitudinal Loyalty**

Attitudinal loyalty is defined as capturing the emotional and cognitive components of brand loyalty (Kumar and Shah, 2004; Ozuem et al., 2016). Oliver (1999) aligns his description with this belief by defining loyalty as a deeply held commitment to rebuy or re-patronise preferred products or services consistently in future, despite situational influences and marketing efforts having the potential to cause switching behaviour. This type of loyalty represents a more long-term and emotional commitment to

an organisation (Bennett and Rundle-Thiele, 2002; Shankar et al., 2003; Albert and Merunka, 2013), which is why attitudinal loyalty is referred to as “emotional loyalty” that is regarded as being “much stronger and longer-lasting” (Hofmeyr and Rice, 2000). This analogy has been compared with marriage (Albert and Merunka, 2013; Dwyer et al., 1987).

Furthermore, attitudinal loyalty denotes the psychological commitment of a consumer in the purchase intention, such as the decision to buy and recommend without necessarily doing a repeat purchase (Jacoby, 1971). Thereafter, Jacoby and Kyner (1973) defended Jacoby’s (1971) definition of brand loyalty. Their definition was expressed as a set of six necessary and collectively sufficient conditions, brand loyalty is: (1) biased (non-random), (2) a behavioural response (purchase), (3) expressed over time, (4) expressed by some decision-making unit, (5) expressed with regards to a single or multiple brands, and (6) a psychological function (decision) processes. They stated that it is the evaluation process (the sixth condition) that makes an individual develop a commitment towards a brand. The following response portrays this notion quite clearly:

*“No I won’t switch, I will not use any other phone as my circle of friends are users of iPhone”* (IT Consultant, Ghana).

*“I will not necessarily switch”* (Web designer, Ghana).

Attitudinal loyalty is preferred to behavioural loyalty (Day, 1969; Dick and Basu, 1994) for the following reasons: (i) A behaviourally loyal customer may be spuriously loyal, that is, they may remain loyal to a brand, an organisation or service provider until a better alternative in the marketplace is available (Dick and Basu, 1994). On the other hand, attitudinally, a loyal customer has some attachment or commitment

to an organisation, service or brand and is not easily swayed by a slightly more attractive alternative. (ii) Attitudinal loyalty indicates not only higher repurchase intent but also resistance to counter-persuasion, resistance to adverse expert opinion, willingness to pay a price premium, and willingness to recommend the service provider or brand to others.

### **7.8.2 ii) Behavioural loyalty**

The Initial marketing research saw customer loyalty mainly in a behavioural way, measuring the concept as behaviour involving the repeat purchase of a particular product or service (Kuo et al., 2013). This was assessed either in the order which it was bought or as a fraction of total purchases made, or acts of recommendation. It was also evaluated by the extent of the relationships, scope, or both, or as several of these factors together (Yi, 1990; Hallowell, 1996; Homburg and Giering, 2001). Nam et al. (2011) confirmed the above-mentioned perception by stating that loyalty has traditionally been conceived of as a behavioural construct, relating to intentions towards repeat purchases. Put simply, Nam et al. (2011) refer to behavioural loyalty as the frequency of repeat purchasing. Ehrenberg et al. (1990) believe that repeat purchasing can capture the loyalty of a consumer towards its preferred brand.

Kuusik and Varblane (2009) identify three sub-segmented reasons for behaviourally loyal customers: (i) those that are forced to be loyal (e.g. by monopoly or high exit costs), (ii) those that are loyal due to inertia, and (iii) those that are functionally loyal. Oliver (1999) attaches the concept of inert loyalty to routine purchases, so that a sense of satisfaction is not experienced and it becomes a task. From a marketing perspective, this suggests that as long as there are no specific “triggers” to compel

behaviourally loyal customers to change, they will remain passively loyal (Roos, 1999). The following comments strongly confirm the above position:

*“Yes I will change if I get the opportunity to do so”* (News editor, Ghana).

*“I don’t mind trying another brand”* (Entrepreneur, Ghana).

*“Why not, but not really”* (Dentist, UK).

*“Not sure”* (Student, UK).

*“Not at the moment”* (Owner, international couriers, UK).

In the interview, the Entrepreneur’s comments further explain the issue of spurious loyalty when he mentions:

*“... I’m loyal, however if something better comes along I’ll try it, I may go back to the original if that’s the one I feel comfortable with and I feel that same way with my current iPhone too. If I had a better offer that was maybe sophisticated or different that I thought would be better, then I would try it”* (News editor, Ghana).

According to Liu et al. (2007), even when presented with more attractive alternatives, consumers who have high inertia will be reluctant to change. Kuo et al. (2013) link this tendency to consumer familiarity and perceptions that frequenting a familiar service provider requires less effort. They state that consumer inertia has greater influence over repeat purchase intentions, and they recommend that managers make efforts to develop consumer consumption inertia.

## **7.9 Brand Resilience**

Experiential benefits create emotional benefits which enable emotional brand connections in consumers. According to Aaker 2009, “it makes sense for marketers to consider emotional, self-expressive and social benefits” as a source of value. The author describes emotional benefits as “the ability of the brand to make the buyer or

user of a brand feel something during the purchase process or user experience". Thomson et al. (2005) and Park et al. (2010) emphasise the role of emotional reactions to the brand in forming consumer–brand connections.

On a similar note, brand affect is a brand's ability to provoke a positive emotional response from a consumer as a result of its use (Sung and Kim, 2010). Customers are known to form affect-laden (emotion-based) relationships with brands that match their personality (Albert and Merunka, 2013), which provide a means to self-expression, self-definition and self-enhancement. Brand value is subsequently co-created through the affective relationships that customers form with their brands, and this may be determined through both direct (i.e. usage or consumption) or indirect (i.e. pure perception) contact with the brand (Merz et al., 2009).

It is perceived that brands are created via a combination of rational and emotional components and that emotions evoked by brands may improve purchases (Albert and Merunka, 2013). Consumers can become emotionally attached to brands, which subsequently predicts their commitment to the brand (brand loyalty) and their willingness to pay a price premium for it (Thomson et al., 2005). Such an attachment reflects an emotional bond with the brand (Albert and Merunka, 2013). Researchers and practitioners have recognised the importance of creating emotional connections between consumers and brands. Berry (2000) suggests that any great brand makes an emotional connection with the intended audience. Respondents indicated:

*"Yes, I will buy, I feel some commitment to the brand as I said earlier. It's very durable"* (MBA student, Ghana).

*"Yes, I will repurchase, because my phone is an essential part of my life and I will invest in the best phone for myself"* (Web designer, Ghana).



*“Yes I will repurchase because I got used to this brand and I will not switch, and learning how to use a new phone from a different company” (Store Manager, UK).*

Consumers live in an emotional world. Their emotions influence their buying decisions, hence brands that connect with consumers' emotions are those that replicates their core values. For consumers, advertising often connects brands to the emotional benefits associated with product use. Emotional benefit information is thought to provide data about affect-based experiences such as excitement and joy associated with the brand (Ruth, 2001).

### **7.9.1 i) Brand Commitment**

Commitment is defined by Stryker and Stratham (1985) and Leckie et al. (2016) as the degree to which an individual's relationships with particular others reflect the extent to which important significant others are judged to want the person to occupy a particular role position. Commitment to a particular role identity is high if people perceive that many of their important social relationships are predicated on the occupancy of that role. Brand commitment is the promise a consumer makes towards a brand choice in the same product category (Leckie et al., 2016), seen as synonymous with attitudinal loyalty (e.g. Chaudhuri and Holbrook, 2001).

Respondents shared the following views:

*“Yes I will continue to buy even if there is substantial increase in price, as far as it maintains its position as the leading Smartphone” (Web designer, Ghana).*

*“Yes, I will repurchase. iPhone is priced for the upmarket which also identifies with a specific group of people (mostly professionals). This also prevents fake brands from penetrating the market” (IT consultant, Ghana).*

*“Yes I will repurchase because I got used to this brand and I will not switch, and learning how to use a new phone from a different company” (Business analyst, UK).*

*“No, I will not purchase any other, because the IOS (the Apple software) is unique to only Apple, unlike Android and others” (Teacher, UK).*

The consequence of vacating such a role is a loss of a social network that is psychologically important; for example, for the self-concept and for self-esteem (Hoelter, 1983). Stryker (1980) identified two types of commitment. First, interactional commitment, reflecting the number of roles associated with a particular identity (the extensivity of commitment), and second, affective commitment, referring to the importance of the relationships associated with identity; in other words, the level of effect associated with the potential loss of these social relationships (the intensity of commitment).

The more strongly committed a person is to an identity in terms of both interactional and affective commitment, the higher the level of subsequent identity salience. In terms of network relationships, the more fully a person's important social relationships are based on occupancy of a particular identity, in comparison with other identities, the more salient that identity will be. Similarly, the larger the number of persons included in such a set of social relationships, the more salient the identity (Stryker and Serpe, 1982).

By acknowledging the impact of social networks on people's self-concepts, identity theory links the wider social structure, in terms of role positions, and the person's more intimate social networks (through levels of commitment to different role positions) to the self-concept. It also connects the social structure to the development and maintenance of social relationships (Serpe, 1987).

### 7.9.2 ii) Brand Switching

Switching occurs when a customer is motivated to review their available alternatives in a marketplace due to “a change in competitive activity in the marketplace” (Seiders and Tigert, 1997; Jung et al., 2017). Similarly, Hogan and Armstrong (2001) posited that brand switching is about replacing an incumbent resource with a more valuable one to achieve competitive advantage. Sathish et al. (2011) and Jung et al. (2017) indicated that brand switching is a consumer behaviour in which the behaviour of the consumers differs based on the levels of satisfaction the consumers find with the providers or companies. Hence, brand switching can be enunciated as the process of being loyal to one product or service and switching to another, due to dissatisfaction or any other problems. They further elaborate that even if a consumer is loyal to a particular brand, if the brand does not satisfy his/her needs, the consumer may switch to a competing brand. The following responses are relevant here:

*“Yes I will change if I get the opportunity to do so”* (News editor, Ghana).

*“I don’t mind trying other brands”* (Kwame, entrepreneur, Ghana).

As hinted earlier, switching occurs when a customer is motivated to review their available alternatives in the marketplace due to a change in competitive activities in the market (Seiders and Tigerts, 1997). Economists view consumer choices as a means to achieve maximisation of functional utility (McFadden, 1986). One respondent noted:

*“No, I will not buy again; I am concerned about affordability”* (Dentist, Ghana).

### 7.10 Brand Advocacy

Brand advocacy is defined as the extent to which people actively recommend or support a specific brand within a product category to the retail customer. Brand ad-

vocates are “active” when they have emotional bonds with a brand, and “live” this brand through high involvement and WOM (Wragg, 2004). Advocacy offers financial advantages for brand managers. A critical factor in the success of any advocacy campaign is attracting the right kind of customer (Villanueva et al., 2008). Within social networks, people who are similar to each other are more likely to have greater interpersonal interactions and to have greater influence over each other (McPherson et al., 2001). Some of the interview responses that are relevant here are as follows:

*“Honestly, I will always recommend the Samsung to family and friends. My recommendation is purely based on the fact that the brand offers good quality and value for money”* (Gregg, customer service assistant, UK).

*“I will recommend to my pals, no doubt. Especially those who expect more from a Smartphone, since the functions the iPhone provides are amazing”* (News editor, Ghana).

Survey respondents also mentioned:

*“Yes, I will recommend, because I have never sent this iPhone for repairs and never had a challenge with it”* (IT consultant, Ghana).

*“Yes, I will recommend, because it’s the best Smartphone with distinct features”* (Web designer, UK).

Ultimately, brand-based relationships lead to volitional brand advocacy and relatively greater sales efforts directed toward enhancing the brand’s performance (Bendapudi and Berry, 1997).

#### **7.10.1 i) Brand Image**

The image of a brand is a subset of associations that reflect what a brand stands for, and how favourably the consumer views it. Brand image is closely related to brand personality. Plummer (1985) indicates that brand personality comprises specific associations with particular characters, symbols, and types of users.

Brand image and brand personality are related, but are not the same. Brand image is derived from the subjective views that consumers assimilate from different brand attributes and the consequences of using a brand. Brand personality, on the other hand, tends to be derived from associations with particular characters, symbols, endorsers, lifestyles and types of users (Batra et al., 1996, p. 321). Brand image is therefore defined as those subjective perceptions that consumers hold about a brand that influence their evaluation of the brand (Brodie et al, 2013).

While prevailing theory conceptualises brand image as a complex combination of tangible and intangible product attributes, this study explains brand image from an interpretive (Cornelissen, 2000; Moingeon and Ramanantsoa, 1997) and symbolic (Levy, 1997) representation perspective. Symbolic interpretative representations may emanate from several sources including functionally composed brand identity features such as: (i) the brand name and possibly the company name; (ii) jingles from advertising or other forms of integrated communications; (iii) retail outlets; (iv) price; (v) packaging; (vi) the physical and general appearance of the brand, and the attributes of the product itself, and (vii) the actual experience of using the brand. Respondents had this to say:

*“Yes, I will recommend, the brand is of good quality and sets the user apart”* (Customer service assistant, UK).

*“Yes, I will recommend because it hardly gets infected with a virus and hardly ever malfunctions”* (Web designer, Ghana).

#### **7.10.2 ii) Word-of-Mouth**

Elaborating on the positive relationship between customer satisfaction and loyalty mentioned above by Shankar et al. (2003), Taylor and Baker (1994) also confirm that customer satisfaction is widely recognised as a key influence in the formation of con-

sumers' future purchase intentions. Similarly, satisfied customers are more likely to tell others of their favourable experience and, thus, engage in positive word-of-mouth (WOM) advertising (File and Prince, 1992). Importantly, social networks allow consumers to co-create the brand among networked "friends", and their interaction on the network has revolutionised ideas about concepts such as WOM (Kozinets et al., 2010). Branding theory and practice must therefore understand the relational structure of the network in order to understand the relationship between customers and brands. Participants provided evidence as follows:

*"Yes, I will recommend, due to satisfaction with previous experience"* (Teacher, UK).

*"Yes, I will recommend, because I have never sent this iPhone for repairs for years and never had a challenge with it"* (IT consultant, Ghana).

*"Yes, I will recommend, because it's the best Smartphone with distinct features"* (Web designer, Ghana).

*"Yes, I will recommend since most of my friends are in the same career as me and the functions the phone has helps, especially for interactive learning"* (Lab technician, UK).

*"Yes, I will recommend as it helps when your friends use the same brand"* (Owner, international couriers, UK).

Table 7.8 below, shows a summary of the identified categories, dimensions and properties as they related to the brand loyalty and switching behaviour discussed in this chapter.

**Table 7.8 Summary of Properties and Dimensions of Open Categories**

No.	Open Category	Properties	Dimensions
1	Self-congruence	Self-concept	Positive  Negative

		Self-esteem  Belongingness  Prestige	
2	Functional Utility (Quality)	Perceived Value  Customer Satisfaction	High  Low
3	Brand Distinctiveness	Uniqueness	High  Low
4	Brand Loyalty	Brand switching  Attitudinal Loyalty  Behavioural Loyalty	High  Low
5	Resilience  (New Innovative Product)	Brand switching	High  Low
6	Resilience  (Competitive Pricing)	Commitment	High  Low
7	Brand Advocacy	Brand Image  Word-of-Mouth	Positive  Negative

## 7.11 Conclusion

This chapter presented a detailed analysis of the in-depth semi-structured interviews and open-ended survey questionnaire data. Through the application of the grounded

theory procedures of data collection and data analysis, concepts were discovered question-by-question for an objective comparative method, and with a focus on theoretical concepts. This resulted in a number of incidents which were grouped and constantly compared for similarities and differences to produce concepts.

These concepts were identified based on the analysis of data from interview questions and survey questionnaires. Concepts that emerged from both the interview and the survey questions were simultaneously compared until no new concepts were identified. The analysis resulted in the emergence of seven open categories expressed in terms of their properties and dimensions. They include:

- ***Self-Congruence***
- ***Functional Utility***
- ***Brand Distinctiveness***
- ***Brand Loyalty***
- ***Resilience (New Innovative Product)***
- ***Resilience (Competitive Pricing)***
- ***Brand Advocacy***



Each of the open categories was discussed in terms of its properties and dimensions as these related to the data on the brand loyalty and switching behaviour from an identity theory perspective. The open categories were rearranged in a different way with the purpose of discovering how they can be related axially. Axial coding procedurally follows after the open coding process has been completed. Axial coding using a grounded theory methodology enables the identified categories to be linked at the level of properties and dimensions. The next chapter explains how interrelationships between the six identified categories were established through the implementation of the paradigm model of grounded theory.

## **CHAPTER EIGHT**

### **ANALYSIS OF DATA: AXIAL AND SELECTIVE CODING**

#### **8.1 Introduction**

This chapter presents the outcomes of the axial and selective coding processes towards the development of the theory of resistance to brand switching from an identity perspective. Axial coding is the next procedural step after the open coding process has been completed. Axial coding in a grounded theory methodology is used to order and arrange categories in terms of their relationship with each other. Through the application of the paradigm model to the categories that emerged during the open coding (see previous chapter), seven main categories were identified. Each main category subsumes a combination of open categories. Axial coding was followed by selective coding, which integrated, interpreted and refined the major categories and their sub-categories to form a story line that described what happened in the phenomenon. Using the kind of axial coding recommended by Strauss and Corbin (1998), four primary tasks were completed: (a) laying out the categories in terms of their properties and dimensions, (b) identifying the circumstances, connections, relationships, actions and consequences that can be traced to the phenomenon, (c) drawing links between categories and sub-categories through analyses of statements, and (d) identifying how the major categories relate to one other.

#### **8.2 Axial Coding**

The primary purpose of axial coding “is to begin the process of reassembling data that were fractured during the open coding” (Strauss and Corbin, 1998, p. 124). Axial

coding can be described as a set of procedures that allows data to be organised in new ways after the process of open coding. This is accomplished by making connections between categories along the lines of their properties and dimensions identified at the open coding stage. The underlying assumption of the grounded theory methodology is that each category has links with other open categories. Axial coding identifies and establishes relationships between categories to “form a more precise and complete explanation about the phenomenon” (Strauss and Corbin, 1998, p. 124). The next section establishes the relationships between the categories that emerged during open coding. The links that were identified from the analysis of the survey and interviews are indicated in Figure 7.8 in Chapter Seven. These establish the relationships between the open categories during the axial coding process which is shown below in Table 8.1.

**Table 8.1 Relationship between open codes and axial codes**

<b>Main Categories (Open Coding)</b>	<b>Renamed Categories (Axial Coding)</b>
1. Self-Congruence	<b>Identity</b>
2. Functional Utility + Brand Distinctiveness	<b>Customer Satisfaction</b>
3. Brand Loyalty	<b>Brand Loyalty</b>
4. Resilience (New innovative Product)	<b>Disruptions</b>
5. Resilience (Competitive Pricing)	<b>Brand Switching</b>
6. Brand Advocacy	<b>Brand Advocacy</b>

The next step in the process of axial coding is identifying the conditions, actions and interactions, and consequences associated with the phenomenon through the application of the paradigm model recommended by Strauss and Corbin (1990). It provides a coherent explanation of what is going on. The process further examines relationships among the data and explores the conditions (contextual, causal, and intervening), actions/interactions, and consequences. In axial coding the phenomenon represents the category whilst the other components of the paradigm model become sub-categories.

The sub-categories address issues such as where, how, why and with what consequences the phenomenon occurs and these are undertaken to further conceptualise the phenomenon. Axial coding further examines the details of the data, de-contextualizing them from the specific survey and interviews to consider them as part of a body of evidence. During the final phase of the axial coding, data is re-contextualised in new ways guided by the analytical processes of constant comparison, categorisation and synthesis. This is followed by a presentation of the analytical flow that ties the components of the paradigm model to the main categories and their subsequent relationship with the phenomenon. The paradigm model addresses two critical components of the theory: the “structure” and the “processes”. Strauss and Corbin (1998, p. 165) described a process as a chain of activities that develops from an action/interaction evolving over time or period of time.

Strauss and Corbin (1998) characterise the “phenomenon” as the “repeated pattern of actions/interactions, events, or happenings that represent individual and group responses to problems and situations in which they find themselves” (p. 130). Patterns in experience, response, and action/interaction are labelled as phenomena and ex-

amined for relationships. The phenomenon answers the question “What is going on here?” (Strauss and Corbin, 1998, p. 130).

### **8.2.1 The Phenomenon**

Switching occurs when a customer is motivated to review available alternatives in a marketplace due to “a change in competitive activity in the marketplace” (Seiders and Tigert, 1997). Hogan and Armstrong (2001) posited that brand switching is about replacing an incumbent resource with a more valuable one to achieve competitive advantage. Sathish et al. (2011) indicated that brand switching is a consumer behaviour where the behaviour of the consumers differs based on the satisfaction level of the consumers with providers or companies. Hence, brand switching can be described as the process of being loyal to one product or service, and switching to another due to dissatisfaction or any other problems.

In relation to Question 14, respondents were asked if they would try other brands even though they were satisfied with the incumbent. Loyalty to a particular brand of Smartphone was identified as a key phenomenon from the analysis of the survey and interview data. Question 15 asked “Would you buy this brand even if new Smartphones are launched by competitors?” Through the application of the paradigm model, the causal condition of market disruptions (which is innovation in the Smartphone industry) led to the phenomenon that represented the issue of the possibility of brand switching, which was the basis of the emerging theory. Indeed, the phenomenon of brand switching included the properties of commitment, behavioural loyalty and attitudinal loyalty and these properties reflected the views of users of Smartphones in both Ghana and in the UK.

Recent developments in choice modelling show that identity theory suggests that brand switching also serves socio-psychological purposes besides functional utility maximisation (Rao et al., 2000; Tajfel and Turner, 1979; Sweeney and Soutar, 2001; Hsu and Liou, 2017). This theory states that consumers develop their identity through associations and interactions that occur in social groups. Such social group memberships are valued by consumers and uniquely separate them from those outside the group, forming the in-group and the out-group. In line with this, the majority said they would stick with their current Smartphone because they have used other brands of Smartphones before, and they believe theirs is unique. They are therefore not motivated to switch. Again, most answered that their circle of friends were users of particular brands, which made it somewhat difficult to switch.

### **8.2.2 Causal Conditions**

Causal conditions are events and occurrences that influence the development of the phenomena, such as being at a certain kind of place or experiencing a particular type of influence (Strauss and Corbin, 1998). They can be thought of as the background necessary, but not sufficient, for the development of the phenomena (Woods, 2007, p. 111). This may “explain why and how persons or groups respond in certain ways” (Strauss and Corbin, 1998, p. 130). In an attempt to identify the causal condition, the researcher focused on the phenomenon while systematically going back to the data to consult the set of events, happenings or incidents that led to the occurrence of the phenomenon (Strauss and Corbin, 1998).

Market disruptions are the major cause of brand switching. These disruptions are major happenings in a market which tend to threaten customer–brand relationships (Fournier, 1998; Stern, Thompson and Arnould, 1998; Christensen, 2013; Jung et

al., 2017). Disruption is defined as a situation in which markets cease to function in a regular manner. Such a situation is typically characterised by rapid and large market declines (Christensen, 2013).

However, this research focuses on disruptions that occur within product markets. As noted by Surgut McGrath (2011), the concept of “market disruption” that occurs in a product market immediately harkens to research into two areas that have enjoyed significant contribution over the years: technology and innovation. Disruptions literally uproot and change how we think, behave, do business, learn and go about our day-to-day activities. According to Christensen (2013), disruptions displace an existing market, industry or technology, and produce something new and more efficient and worthwhile.

The theory of disruptive innovation introduced by Christensen (2013) offers an explanation for the displacement of industry by smaller competitors, almost always new entrants (Bower and Christensen, 1995; Christensen 2013). Disruptive innovation is an innovation that helps create a new market and eventually goes on to disrupt an existing market. This terminology is employed in business and technology literature to designate innovations that seek to provide some sort of improvements in a product or service that exceed expectations, first by designing for a different set of consumers in the new market and later by lowering prices in the existing market.

According to Surgut McGrath (2011), the theory’s explanatory power comes from the notion that industry incumbents and new entrants follow different technology trajectories. Industry leaders tend to focus on sustaining innovations that continuously improve their flagship products, increasing overall performance in attributes that are perceived as being important for their existing customer base. Over time, the perfor-

mance increase achieved through sustaining innovation begins to overshoot the needs of the best customers who pay the most, whereas the new entrants' disruptive products become good enough to meet the needs of the dominant incumbents' customers.

The causal condition was technology and innovation; this mainly involves the introduction of radically new brands of Smartphone into the market. The introduction of new brands of Smartphones causes the phenomenon of brand switching to happen. Data from surveys and the consumers interviewed pointed out that consumers acknowledged their awareness of the disruptions in the Smartphone market due to new and sophisticated brands that are introduced regularly. Most respondents and interviewed participants indicated that they would rather choose a new innovation from their incumbent brand than that of a different brand, and this was mainly because they had grown used to the incumbent brand, or they thought the difference might not be significant.

### **8.2.3 Context**

Context denotes “the specific set of conditions (patterns of conditions) at a particular time and place that interact dimensionally in order to create the particular circumstances or problems by which individuals respond through a blend of action/interaction” (Strauss and Corbin, 1998, p. 132). The contextual conditions further answer the “why” of the phenomenon. In order to provide the contextual framework for the actions and interactions, these questions were asked:

*I. “Would you buy this brand even if new Smartphones are launched by competitors?”*

*II. “Would you continue to buy this brand of Smartphone irrespective of price?”*



The contextual conditions are attitudinal loyalty and behavioural loyalty. These contextual conditions affect the developed strategies through the properties of the open category of brand loyalty. Brand loyalty is a deeply held commitment to rebuy or repatronise, on a consistent basis, a selected brand, irrespective of external influences such marketing activities initiated by competitors with potential to cause switching behaviour (Oliver 1999; Dwivedi, 2015; Liu et al., 2012; O’Keeffe et al., 2016). Indeed, the participants interviewed agreed that they did not intend to switch and would prefer to stick with their current Smartphone product, either because they are used to it in terms of manoeuvrability and accessibility of the functions, or because their circle of friends had the same product.

Customer loyalty in the Smartphone industry (Kim et al., 2016; Jeong et al., 2016; Tan et al., 2017), in a behavioural way, measures the concept as behaviour involving the repeat purchase of a particular product or service, evaluated variously by the sequence in which it is purchased, as a proportion of purchases, as an act of recommendation, and as the scale of the relationship (Hallowell, 1996; Homburg and Giering, 2001; Yi, 1990). Nam et al. (2011) confirmed this notion by insisting that loyalty has been traditionally conceived of as a behavioural construct involving consumers’ intentions towards repeat purchases. Simply, Nam et al. (2011) refer to behavioural loyalty as the frequency of repeat purchasing. Ehrenberg et al. (1990) believe that repeat purchasing can capture the loyalty of a consumer in respect of the brand in which they are interested.

Kuusik and Varblane (2009) identify three sub-segmented reasons for behaviourally loyal customers. Oliver (1999) attaches the concept of inert loyalty to routine purchases, so a sense of satisfaction is not experienced and it becomes a task. From a

marketing perspective, it suggests that as long as there are no specific “triggers” to compel behaviourally loyal customers to change, they will remain passively loyal (Roos, 1999; Kuusik and Varblane, 2009).

With regard to the above, most of the participants interviewed admitted that they were loyal to their incumbent brand provider; however, if something better came along they might try it. Again, some respondents confirmed that if an innovative make was introduced that was perhaps more sophisticated or different to what they were expecting then they would switch brands.

Attitudinal loyalty is about capturing the emotional and cognitive components of brand loyalty (Kumar and Shah, 2004; Ozuem et al., 2016). Oliver (1999) aligns his description with this belief by defining loyalty as a deeply held commitment to rebuy or re-patronise preferred products or services consistently in future, despite situational influences and marketing efforts having the potential to cause switching behaviour. This type of loyalty represents a more long-term and emotional commitment to an organisation (Bennett and Rundle-Thiele, 2002; Shankar et al., 2003; Leckie et al., 2016), which is why attitudinal loyalty is referred to as “emotional loyalty” which is regarded as being “much stronger and longer-lasting” (Hofmeyr and Rice, 2000) and has been compared with marriage (Albert and Merunka, 2013; Bennett and Rundle-Thiele, 2002; Shankar et al., 2003; Ozuem et al., 2016).

Attitudinal loyalty denotes consumers’ psychological commitment to repurchase and recommend the brand (Jacoby, 1971). Attitudinally loyal customers have some attachment or commitment to a brand and are not easily swayed by a slightly more attractive alternative. Attitudinal loyalty indicates not only higher repurchase intent but also resistance to counter-persuasion to switch to a new offering. It shows resistance

towards negative views, and this drives consumers' willingness irrespectively to purchase at a premium price, and further recommend the brand to others. Respondents clearly displayed this attribute by insisting that they would not switch to any other phone as their circle of friends were users of specific brands of Smartphone.

#### **8.2.4 Intervening Conditions**

These are conditions mitigating or otherwise modifying the effect of causal conditions on the phenomena (Strauss and Corbin, 1998). These general contextual conditions influence strategies. In this study, the intervening conditions were present and manifested in different situations for the phenomenon. Some of the intervening conditions occurred because of unexpected events, which caused the individual to respond in a new way to the situation through a form of actions and/or interaction.

Perceived value was considered to be the key intervening condition, and included properties such as functional utility, quality and durability. The identification of the intervening conditions led to posing the questions:

*I. "How distinct is your Smartphone from other Smartphones?"*

*II. "How satisfied were you with iPhone in terms of quality and functions?"*

The interviews conducted with users revealed that they were very happy with the quality and durability as well as the functionalities of their products. The functional benefits of brands are often product-oriented and satisfy immediate and practical needs. Such benefits are often associated with problem-solution or avoidance (Keller, 1993). Functional benefits, particularly those based on attributes, link directly to consumer decisions, but are not without their limitations, since they fail to differentiate, and moreover are easily replicated (Aaker, 1996; Jung et al., 2017). The survey

and interview responses suggest participants believe that their current Smartphone gives them satisfaction in terms of quality and functions. This explains why organisations that focus on quality through innovation and technology are likely to disrupt the product market with new and sophisticated products.

Relative perceived value refers to how a utilitarian or functional benefit of a brand surpasses an alternative brand that belongs to the same product category (Lam et al., 2010, 2013). With its relevance to functional utility, relative perceived value influences switching behaviour as functional utility maximisation. Respondents claimed they were happy with the quality of their Smartphones and that they were of the view that functions were easy to use, and had many features which other brands could not offer.

### **8.2.5 Action/Interaction**

An action connotes the stream of actual causal interventions that people use to resolve situations or issues which they encounter. Interactions are mutual and comprise reciprocal action or influence. Strauss and Corbin (1998) characterise actions and interactions as either strategic or routine. Strategic actions/interactions are purposeful and are intended to resolve a problem, or to respond to the unexpected. Routines are the actions/interactions taken in response to everyday life, which include rules, protocols, and ways of acting that maintain the social order. Indeed, actions which occur in response to changes in the context may be “strategic” when they are “taken in response to problematic situations”, or “routine” when they are “carried out without much thought” (Strauss and Corbin, 1998, p. 165). Actions/interactions play a significant role in establishing the dynamics between individuals, groups and organisations.

The study discusses switching behaviours and organisational responses to contexts affecting the strategic actions and interactions. These comprise the input of the concept of self-congruence. Self-congruity refers to how much a consumer's self-concept is congruent with the personality of a typical user of the brand. Brand personality is the set of human characteristics associated with a brand (Aaker, 1997; Da Siveira et al., 2013; Wang and Yieh, 2016). Consumers incline towards those brands with similar personality traits to themselves. Individuals are driven by a need to feel good about themselves, and try to maintain as well as enhance their own self-esteem (Malär et al., 2011). One way towards achieving this is to consume brands that are congruent with one's own view of self, or ideal self (Sirgy, 1982). Indeed, brands may be viewed as a system of signs in the construction of the self (Schembri et al., 2010). Consumers evaluate the symbolism of the brand and determine whether it is appropriate for their 'selves' (Ahuvia, 2005; Belk, 1988; Schouten, 1991; Da Siveira et al., 2013; Wang and Yieh, 2016).

In relation to the above, respondents were asked 'if the brand symbol gives them recognition and reflects their personality, respectively'. This notion was evident from feedback from respondents and participants as data from most users suggest that they perceive that the brand is not just about making money but is about making a difference. This drives their connection with the brand, and it makes it vital to them. Identity is considered an action/interaction strategy, including its properties of self-concept, self-esteem, belongingness and prestige. Identity, as an action/interaction strategy in response to the phenomenon of brand switching, provides a strong basis for organisations to capture the repurchase intentions of consumers.

Thoits (1983, 1986) suggests that identities provide a sense of purpose and meaning in life, defining who we are, as well as why we behave in specified ways in society. They integrate us with the actions and expectations of others. Identities thus increase self-esteem.

### **8.2.6 Consequences**

Consequences refer to the outcome or results of actions/interactions (Strauss and Corbin, 1998). These may be intended or unintended; primary or secondary. An unintended consequence arises when an action that is performed with the intention of producing one consequence produces a different one, which can be conflicting, negative or positive. A primary consequence is the immediate intended result of an action. A secondary consequence is the result of a primary consequence, and can be either intended or unintended. Indeed, consequences are the larger outcomes associated with the phenomena, rather than specific outcomes for every action/ interaction explored as far as the study is concerned. This was identified through the question, "Would you recommend to a friend?" and in response to the phenomenon of brand switching.

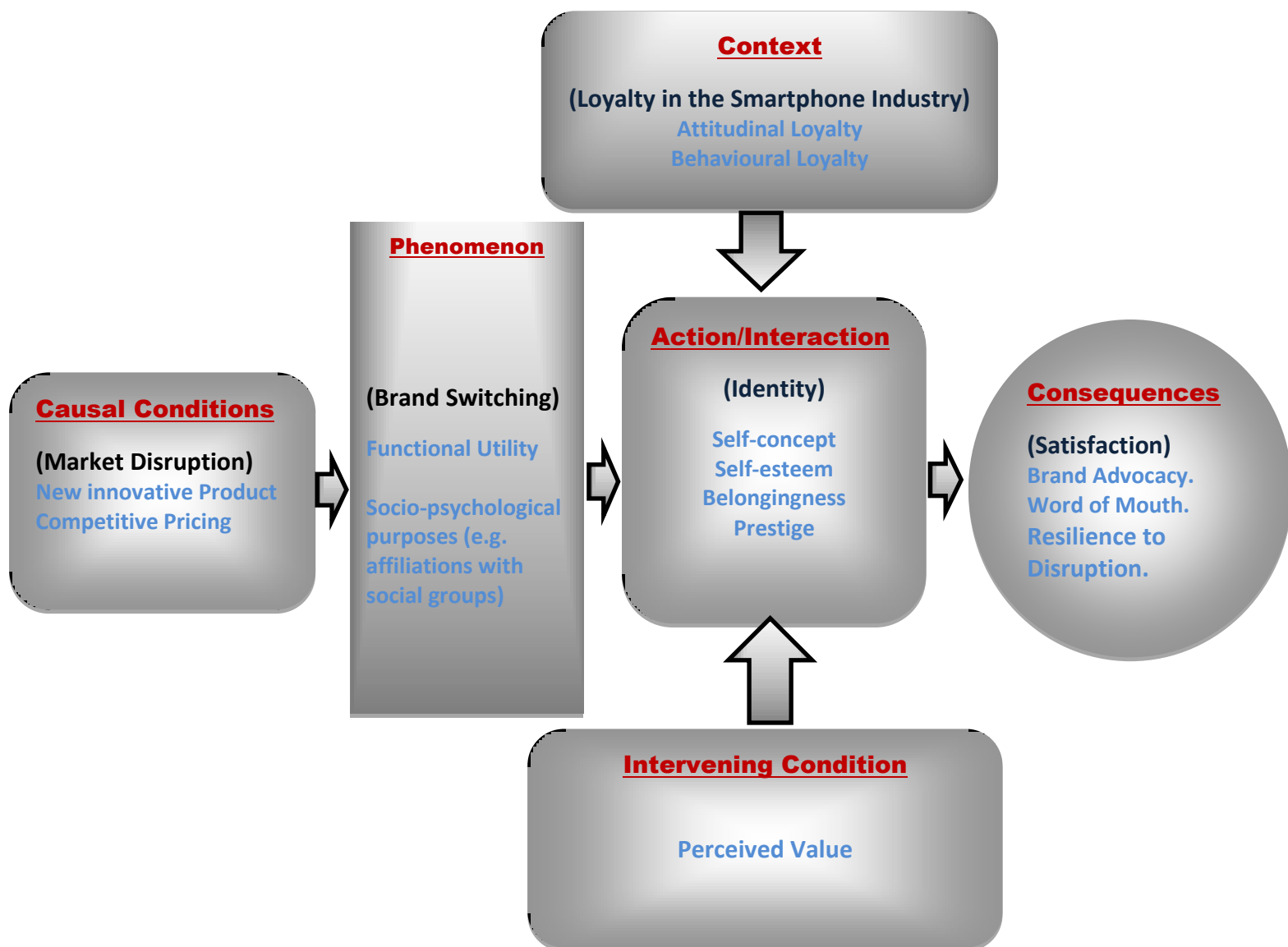
Brand advocacy, resilience to disruptions and positive word-of-mouth were identified as the consequences as a result of the customer satisfaction. Brand advocacy describes the results from the implementation of strategies related to the effects of identity on brand switching behaviours among Smartphone users. Brand advocacy is the extent to which people actively recommend or support a specific brand within a product category. Brand advocates are "active" when they have emotional bonds with a brand, and "live" this brand through high involvement and word-of-mouth (Wragg, 2004). Advocacy offers financial advantages for brand managers. A critical

factor in the success of any advocacy campaign is attracting the right kind of customer (Villanueva et al., 2008). Within social networks, people who are similar to each other are more likely to have greater interpersonal interactions and have greater influence over each other (McPherson et al., 2001).

The interviewees confirmed that they would always recommend their current brand of Smartphone to family and friends, and they confirmed that this was purely based on the fact that the brand offers good quality. To summarise, all participants believed that a positive brand image was the result of brand advocacy through positive word-of-mouth. This was evident in the data, as satisfied customers readily shared their positive experiences resulting in positive word-of-mouth (File and Prince, 1992).

The axial coding process examined the data in detail, looking for relationships to provide a better understanding of the properties and their dimensions. It further re-explored the relationship of each phenomenon to the data, exploring the contexts, intervening conditions, actions and interactions, and consequences. Through this re-contextualisation process, relationships among the phenomena have emerged. Axial coding related the phenomena to contexts and actions, and allowed a conceptual understanding of the consequences. By analysing, comparing, categorising and synthesising the data, conceptual relationships have emerged. The interactions between these categories are presented in a coding diagram illustrated in Figure 8.1 below.

Figure 8.1 Axial Coding Paradigm Model of Resistance to Brand Switching





### **8.3 Selective Coding**

In selective coding, the categories generated during open coding and axial coding were integrated and refined with the goal of developing a phenomenon that gives explanatory power to the relationships among the categories. Although axial coding involves the integration and refining of categories (Strauss and Corbin, 1998, p. 43), the process is similar but takes place at a higher level of abstraction in selective coding. In essence, axial coding establishes the basis for selective coding (Strauss and Corbin, 1998). The process of selective coding involves identifying the core category, carrying out further integration of the category, and refining the theoretical schema. Integrating the seven categories is made possible with the paradigm model that functions as a process model linking the action/interactional sequences.

The axial coding model illustrated the relationships that existed among all categories. The process produced six major categories: Identity (self-congruence, self-concept, self-esteem, belongingness, prestige); Satisfaction (brand advocacy, word of mouth, resiliency); Brand Loyalty (attitudinal loyalty, behavioural loyalty); Disruptions (innovative new product, competitive pricing); Brand Switching (functional utility, socio-psychological factors); and Intervening conditions (perceived value). After the relationships between open categories were established during the axial coding process, selective coding was considered.

### **8.4 Relating Core Categories to Axial Categories**

Central to the paradigm model is the core category, which needs to be explained in relation to causal conditions, context, intervening conditions, action/interaction strategies and consequences. A core category was identified as the central category used to connect all other sub-categories (Howell, 2013). Selective coding describes

the interrelationships among the categories and explores the complexities of the relationships among the concepts that emerged, to ensure consistency with the data (Creswell, 2017). During the process of identification and verification of relations between the emerging categories of open coding, brand switching was identified as the core category of the paradigm model. Brand switching was found to be the category which best enables and facilitates the creation of orderly systematic relationships (Strauss and Corbin, 1998) to be established according to the paradigm model. Thus, this process consisted of the reconstruction of the data into a potential substantive theory (Strauss and Corbin, 1998). Table 8.2 below displays the relationship between the open categories and the main categories based on the paradigm model.

**Table 8.2 Sub-categories and their paradigm component**

	<b>Sub Category</b>	<b>Paradigm Component</b>
1	<i>Brand switching</i>	<i>Phenomenon</i>
2	<i>Market Disruptions</i>	<i>Causal Condition</i>
3	<i>Brand Loyalty (Smartphone Industry)</i>	<i>Context</i>
4	<i>Perceived Value</i>	<i>Intervening Condition</i>
5	<i>Identity</i>	<i>Action/Interaction</i>
6	<i>Customer Satisfaction</i>	<i>Consequences</i>

The next step in the process of selective coding allowed for the other categories to be related to the core category. The process demands that each category be

evaluated individually in relation to the core category, namely, “brand switching”. To illustrate the process, questions were used to determine where each category fits in the paradigm model. A category can be linked to any of the components of the paradigm model. However, this was facilitated by asking critical questions to ascertain where the specific category fits best in the paradigm model. For example: “Is it an intervening or a causal condition? Is the category action-oriented or does it apply to the context?” Asking additional questions was helpful to establish these relationships. The core category was selected and systematically related to the main categories which stand for sub-categories. The relationship between the core category and the sub-categories, satisfaction, brand loyalty, brand advocacy, disruptions and identity, were verified using the views and opinions of participants from the semi-structured interviews. Through the application of the paradigm model, the core category is linked with the other sub-categories.

#### **8.4.1 Causal Condition**

Smartphones are radically innovative products which differ from normal products in a product market. The increase in choice and purchase intentions has enabled manufacturers to innovate new services that have created a competitive market environment where multiple companies have introduced new Smartphones, thereby causing market disruptions.

Market disruptions are the major cause of brand switching. They are major events occurring in a market that threaten customer–brand relationships (Fournier, 1998; Stern, Thompson and Arnould, 1998). Disruption is defined as a situation where markets cease to function in a regular manner, typically characterised by rapid and large market declines. For instance, according to data from Kantar Worldpanel

Communication Technology, Samsung's market share shrank in Europe and US, while its competitor's, Apple, rose to just under half of all US Smartphone sales, a 4.3 per cent growth compared to the same period in 2013.

The introduction of iPhone 6 accounted for one in five (19 per cent) of purchases in the last quarter of 2014. Within that period, The iOS accounted for 23.8 per cent of Smartphones across Europe, representing a rise of 6.3 per cent compared to the previous year, 2013. Android's share, on the other hand, fell by 3.2 per cent from 69.9 per cent in 2013 to 66.8 per cent in 2014.

Participants from the semi-structured interviews agreed that there is high level of disruption from the introduction of new and sophisticated Smartphones, which explains the reasons behind switching behaviour in the Smartphone market. The introduction of new products at very competitive prices was confirmed by participants to be a major indicator for brand switching.

#### **8.4.2 Contextual Conditions**

The influence of brand switching behaviour occurs within the context of loyalty in the Smartphone industry, with focus on attitudinal and behavioural loyalty. Nam et al. (2011) refer to behavioural loyalty as the frequency of repeat purchase. Ehrenberg et al. (1990) believe that repeat purchasing can capture the loyalty of a consumer towards the brand of interest.

However, attitudinal loyalty represents a more long-term and emotional commitment to an organisation (Bennett and Rundle-Thiele, 2002; Shankar et al., 2003), which is why attitudinal loyalty is referred to as "emotional loyalty" that is regarded as being

“much stronger and longer-lasting” (Hofmeyr and Rice, 2000) and has been compared with marriage (Albert and Merunka, 2013).

From the above explanations and evidence from the data gathered, behaviourally loyal users of a particular Smartphone are more likely to switch brands than attitudinally loyal users of the same brand, since attitudinal loyal consumers are psychologically committed to a particular brand, and have intentions to purchase and recommend to others.

#### **8.4.3 Intervening Conditions**

Customers' perceived value alters or mitigates the impact of causal conditions on the phenomenon of brand switching in competitive markets.

According to Howard and Sheth (1969), when deciding whether to switch to a competing brand, customers are often guided by their perception of the quality of the brand and that mitigates the impact of the causal condition on the phenomenon of brand switching in a competitive market.

#### **8.4.4 Actions/Interactions**

The action/interaction strategies include embedding customers' self-esteem, self-concept, belongingness and brand prestige into product development. Data from the survey and interviews indicated positive feedback in terms of identity strategies, with the aim of building resistance to brand switching. These identity strategies are used to create self-congruence and to minimise the negative impact of market disruptions and their causal effects on brand switching in a competitive market.

#### **8.4.5 Consequences**

Customer satisfaction is the result of action/interaction strategies. Implementing action/interaction strategies results in high brand advocacy, positive word-of-mouth and resilience to market disruptions. The interviewees believe that satisfaction will cause them to recommend the incumbent Smartphone through positive word-of-mouth.

From the data gathered from respondents, satisfied consumers were less sensitive to price change, less influenced by competitor brands, and more loyal to a particular brand than dissatisfied customers. Customer satisfaction refers to the summary psychological state resulting when the emotion surrounding disconfirmed expectations is coupled with the consumer's prior feelings about the consumption experience (Shankar et al., 2003). Taylor and Baker (1994) also confirm that customer satisfaction is widely recognised as a key influence in the formation of future purchase intentions, thereby building resistance to brand switching.

The development of the paradigm model was an iterative process whereby the relationship of each category and its fit with the paradigm model were verified through recurring systematic analysis. Construct validity, as well as relationship validity, of the paradigm model was established in the process of generating and testing propositions. To Howell (2013), propositions indicate generalised relationships between a category and its concepts, and between discrete categories. Howell (2013) differentiates between propositions that involve conceptual relationships and hypotheses that require measured relationships. Strauss and Corbin (1998, p. 135) describe "hypotheses" as "hunches about how concepts relate". Hypotheses about related concepts, i.e. about concepts that are linked,

explain the what, why, where and how of a particular phenomenon (Strauss and Corbin, 1998, p. 135). The development of propositions is an iterative process aimed at validating relationships among categories that were integrated in the paradigm model. Substantive grounded theory was developed during the selective coding process. Through the constant comparison of the interview and survey data, theoretical propositions were generated, refined and validated to describe the interrelationship among categories (Strauss and Corbin, 1998). The following are the propositions:

- The impact of market disruption on brand loyalty is studied in the context of the Smartphone industry, representing a competitive market. The concept of brand loyalty comprises behavioural loyalty and attitudinal loyalty.
- Customers' perceived value mitigates the impact of brand switching in a competitive market.
- Identity strategies consolidate attitudinal loyalty in response to brand switching in competitive markets such as the Smartphone industry. This is done through brand prestige, belongingness, self-concept, and self-esteem. The strategies aim to enhance attitudinal loyalty and to minimise behavioural loyalty.
- The consequence of these strategies leads customer satisfaction. Customers then build resilience to disruptions and embark on brand advocacy through positive word-of-mouth. This further minimises the impact of brand switching during market disruptions in competitive markets such as the Smartphone industry.

These propositions were generated using the interview and survey data. They indicate how the categories developed in open coding are related to the key phenomenon of brand switching.

## **8.5 Conclusion**

This chapter has presented the axial and selective coding process. The detailed body of data generated a number of concepts, which were grouped into categories. The data from the interviews were analysed in relation to the phenomena that had emerged. The axial coding process established the interrelationships among the phenomena, and illustrated the characteristics of each phenomenon using the paradigm model.

Subsequent to axial coding, the selective coding process presented a synthesis of the insights gained during the analytical processes of open and axial coding. Brand switching was identified as the core category. The final step in the selective coding process was the creation of a narrative, titled “resistance to brand switching from identity theory perspective” that articulated the grounded theory. The next chapter presents the synthesis that brought meaning to the results through the development of substantive grounded theory. It posits related ideas evident in the phenomena around a core category that brought power to the explanation.



## **CHAPTER NINE**

### **CONCLUSION: BUILDING A SUBSTANTIVE THEORY, CONTRIBUTIONS AND FUTURE RESEARCH**

#### **9.1 Introduction**

This thesis has investigated brand switching behaviour in the Smartphone industry based on unique data captured from Smartphone users in Ghana and the United Kingdom. Based on the brand loyalty literature and the identity theory perspective, this thesis has empirically investigated the issue of brand switching in a specific competitive market during disruptions. The specific context has been the introduction of a radically new brand due to innovation in the Smartphone industry. It identified the nature of the factors that influence brand switching behaviour based on empirical data gathered from across Ghana and the United Kingdom. This chapter brings the study to a close by considering the conclusion, by summarising the substantive theory, and by illuminating the implications the research has for further research.

This study employed a combination of the social constructivism/phenomenology paradigm of enquiry using grounded theory as a methodology. The study applied the grounded theory method of open, axial and selective coding to the development of substantive theory to enhance understanding of brand switching in competitive markets such as the Smartphone industry. The formulation of substantive theory is related to the formal theories.

## **9.2 Building a Substantive Grounded Theory**

The study has achieved its objective of developing a substantive theory of resistance to brand switching behaviour within a competitive market. The substantive theory developed in this research achieves this objective by establishing the causal conditions that led to the existence of the phenomenon, the context, the intervening conditions, the action/interactional strategies and the consequences. As a result, the substantive theory provided a thorough understanding of brand loyalty in competitive markets. The establishment of substantive theory will enable technology firms in the Smartphone industry to develop strategies aimed at mitigating or building resistance to brand switching during disruptions in competitive markets.

The study employed the typical grounded theory techniques of simultaneous data collection and analysis to develop a substantive theory of brand switching. The basis of the substantive theory related to identifying the nature of competitive markets and the phenomena that were present. It also identified how these were brought about, and what effect they had on brand loyalty. Consequently, brand switching in competitive markets represents the core category, with disruptions (the introduction of new innovative products and competitive pricing) as the causal conditions. Brand loyalty was the context, and customer satisfaction was the intervening condition. Identity was the action/interactional strategy and brand advocacy was the ultimate consequence. The substantive grounded theory can be summarised as follows:

- Brand switching affects brand loyalty in competitive markets like the Smartphone industry. The search for functional utility maximisation and social-psychological factors influences switching behaviour and the actions of Smartphone users across Ghana and the United Kingdom. Brand loyalty,

however, in the context of a competitive market such as the Smartphone industry, impacts on brand switching behaviour.

- Market disruptions affect the level of brand switching in competitive markets like the Smartphone industry. The introduction of new innovative products and competitive pricing disrupts these competitive markets, causing consumers to switch brands in search of utility maximisation. Market disruptions encourage brand switching and this impacts on loyalty in competitive markets.
- Behaviourally loyal customers exhibit three main motivations to stay loyal and these are: (i) they are forced to be loyal (e.g. by monopoly or high exit costs); (ii) they remain loyal due to inertia, and (iii) they are functionally loyal. From a marketing point of view, there is a clear indication that as far as no particular 'triggers' are present, customers will not switch, until then these customers remain passively loyal.
- Capturing the emotional and cognitive components of brand loyalty, on the other hand, attitudinal loyalty denotes a more long-term and emotional commitment to a brand, the reason it is regarded as emotional loyalty an indicator of a much stronger and longer-lasting.
- From the above explanations and evidence gathered from the data, behaviourally loyal users are more likely to switch brands than attitudinally loyal users, since the latter group of consumers are psychologically committed to a particular brand, and intend to purchase and recommend this particular brand without necessarily taking repeat purchase behaviour into account.
- It was noticed that a relationship exists between brand switching and perceived value, as functional utility tends to influence customers' perceived value, which mitigates the impact of market disruptions.

- It was observed that self-concept, self-esteem and brand prestige tend to have a direct impact on customer satisfaction in a competitive market. This is done through embedding into product customers the ideas of self-concept and self-esteem, which create brand prestige and a sense of belonging, suggesting that implementing these identity strategies would consequently lead to high brand advocacy and positive word-of-mouth.

### **9.3 Relating Substantive Theory to Formal Theory**

A theory is an interrelated set of concepts and propositions, organised into a deductive system to explain relationships between certain aspects of the world (Corbin and Strauss, 1998). A theory connotes a statement of relationships between units observed or approximated in the empirical world. To this end, the explanatory power of a theory can be categorised into four levels of abstraction, namely: formal theory, grand theory, meso theory and substantive theory (Howell, 2013).

Strauss and Corbin (1998) describe a formal theory as more general, and as something that deals with a conceptual area of inquiry which may be linked to a range of substantive areas. A formal theory has explanatory power across a range of situations.

In this research both Giddens' theory of structuration and Bourdieu's theory of Habitus are considered as formal theories, while Goffman's theory could be called meso theory, which helps to explain the identity perspective of developing resistance to brand switching behaviour.

Giddens (1984) presented social structure as a duality, thus as both an internal and external reality. Again, if habitus, as Bourdieu (1990) has it, is acquired at an early

stage in an unconscious fashion, and represents resistance to change, then the issue is the interaction between habitus and practice, rather than its creation through practice. Habitus and structuration, as elaborated above, can be applied across all areas of business organisations and such an idea is therefore relevant in building resistance to brand switching. For this reason, formal theory is usually regarded as the end product of longitudinal research where data are collected from a range of situations. The analysis of both theories provided the background for applying grounded theory to the data collected for this thesis. Through the application of the theoretical coding processes, substantive theory for resistance to brand switching was developed.

#### **9.4 Contributions to Knowledge**

This study has made a number of contributions which lie within its theoretical and practical context. Theoretically, as indicated in Chapter One, and based on the review of literature in Chapter Two, this study bridged the gap in knowledge identified. First, the brand loyalty literature reviewed, focused on how brands perform under normal market conditions. However, this study has provided consideration for prevalent market disruptions in a competitive market (the Smartphone industry), caused by current technological innovations.

The brand loyalty literature, conceptualised and operationalised, perceived brand value as functional utility. However, empirical data from the current study confirms and captures other non-utilitarian factors such as socio-psychological benefits. Data from Smartphone users confirmed that certain underlining factors motivate consumers to continue buying preferred brands, due to self-definitional benefits

beyond utilitarian benefits (e.g. Aaker, 1999; Escalas and Bettman, 2005; Fournier, 1998; Keller and Lehmann, 2006; Park et al., 2009; Stern, 2006; He et al., 2012).

The second theoretical contribution of this research lies in specifically highlighting the role of perceived brand benefits in the formation of CBI. Smartphone users develop resilient relationships with Smartphone brands which they perceive to possess values that match their personality and which they consider congruent to their self-concept (Sirgy 1982; Sirgy, 1982; Da Silveira et al., 2013; Stokburger-Sauer et al., 2012; Lam et al., 2013; Yeh et al., 2016). Smartphone users seem to derive self-congruence between their 'selves' and the brand through brand associations. This is in line with Chaplin and John (2005) who confirm the above by positing that through brand associations consumers develop meaning from a specific brand, from which they consequently derive congruency with their 'selves'.

Again, this study is the first attempt to combine brand loyalty literature, identity theory and grounded theory to study the behaviour of brand switching in competitive markets. From a theoretical perspective, the substantive theory identified brand switching as having a major effect on brand loyalty in competitive markets due to the pursuit of functional utility maximisation and social mobility. This can be useful for brand managers and product development managers to develop products in order to provide customer satisfaction, which mitigates the impact of market disruptions. Furthermore, it is expected that a better understanding of the impact of both customer-brand identity and customer satisfaction on brand switching behaviour will provide guidelines to assist organisations to successfully develop resistance strategies.

Managerially, this study provides pointers for brand and customer relationship managers in terms of how to devise customer relationship strategies to achieve a sustainable competitive advantage. Consumers form strong relationships with those brands which they perceive to have values and personality associations that are congruent with their self-concept (Sirgy, 1982; Da Silveira et al., 2013; Stokburger-Sauer et al., 2012; Lam et al., 2013). This forms a key consideration for brand managers in brand positioning as consumers appear to use brand associations to assess congruence between their 'selves' and the brand. For instance, renowned brands like Rolls-Royce and Harley-Davidson relate their brand identities to consumers' identities (Arnould and Thompson, 2005; Brown et al., 2003; Grayson and Martinec, 2004).

It has emerged from this study that the concept of identity salience is key for brand managers. The direct and explicit implication of the concept of identity salience is that identities positioned higher in the salience hierarchy are tied more closely to consumers' behaviour. Therefore, the more strongly committed a person is to an identity in terms of both interactional and affective commitment, the higher the level of identity salience. In terms of network relationships, the more fully a person's important social relationships are based on occupancy of a particular identity, in comparison with other identities, the more salient that identity. Therefore, marketers must aim to create strong consumer–brand relationships with brands by developing a brand that matches with their identified lifestyle (Solomon, 2002; Badrinarayanan and Laverie, 2011; He et al., 2012; Yeh et al., 2016).

A second managerial implication based on findings from this study indicates that innovative brands such as Smartphones are susceptible to disruption at their initial

stages. This drives huge interest that may interrupt consumer–brand relationships, yet with time this interest may become fragile. Based on the findings, this study proposes that brand managers must allocate investment to build stronger CBI at the maturity stage of a product life cycle to resist switching during disruptions. Managers must invest in marketing activities that improves consumers' perceived quality and self–brand congruity to extend the maturity stage of a brand. This will help ensure that these instrumental and symbolic drivers of the CBI provides resistance to switching over time. It must be emphasised that at this point, brand managers who manage innovative brands such as Smartphones must commit investment to symbolic drivers such as self–brand congruity at maturity stages of the brand life-cycle rather than instrumental drivers such as quality (functional utility). This strategy is effective because symbolic drivers create stronger CBI compared to instrumental drivers. Drawing on the empirical evidence from the study, CBI relates to three valuable consequences for marketing managers: brand loyalty, brand advocacy, and resilience to market disruptions.

Finally, the findings from this study suggest to brand managers that while non-innovative consumers are less likely to identify with a specific brand of Smartphone, brand managers can develop CBI among consumers by concentrating on key drivers of CBI such as perceived quality and self–brand congruity. Brand managers need to have awareness of the fact that even though the perceived quality and self–brand congruity of established brands may not seem to influence consumers at the initial stage of CBI with the new brand, these competitive factors contribute to the dissipation in the growth rate of CBI with the new brand, over a long period of time.



## **9.5 Limitations and Directions for Future Research**

Due to tight time schedules and financial constraints for this research, data was collected within a single window and necessitated analysis and conclusions to be drawn on this limited data. A true reflection of consumers' experiences could be strengthened through several years of data collection in multiple time frames. A study of this nature conducted across two countries could ideally have been conducted with data collected at different time schedules over a longer period. In light of the above the sample size of 74 participants for this study is considered small, to provide accurate reflect of customers' purchase intentions and experiences in the Smartphone industry across two countries.

Another limitation in respect of the methodological approach has to do with the sampling, the data collected and analysis utilised in this study. They present possible limitations because the data was drawn from consumers from only two countries. Therefore, any generalisation that is made outside the two contexts of the UK and Ghana must be performed with caution.

This study provides a framework for research in the Smartphone industry, but considering the time constraints and lack of financial resources mentioned, future research could be extended to include more diverse populations across more than two countries and also include other product categories that are disrupted by technological innovation, to be able to examine if there exist any dissimilarities in terms of CBI formation over time. This will serve as a more rigorous and robust examination of the phenomenon with the CBI framework advanced for the study.

The substantive theory was successful in explaining the influence of disruptions on brand loyalty from a marketing perspective, and it is expected that this substantive

theory based on the CBI model as adapted and advanced for this study could be applied in other disciplines, such as politics. Evidence from this study shows the importance of branding and brand loyalty to non-commercial organisations such as political parties (Moor, 2007; Pich and Dean, 2015), hence the CBI model applied in this study may be applicable in the examination of voters' loyalty to specific political parties. This is imperative for practitioners of politics to develop a political party brand that shares consistent values through their policies and leadership.

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## **Appendix A**

### **Survey Questionnaire**

#### **BUILDING RESISTANCE TO BRAND SWITCHING DURING DISRUPTIONS IN A COMPETITIVE MARKET: AN IDENTITY THEORY PERSPECTIVE**

This research questionnaire seeks to collect unique data from across Ghana and the United Kingdom to examine the issue of loyalty and switching behaviour from an identity theory perspective.

Therefore, as you are a consumer of a particular brand of Smartphone, this questionnaire seeks your cooperation to give your valuable opinion which will contribute to the success of this research. Most of the questions are open-ended and require you to provide detailed opinion. All information given will be treated in the strictest confidence by the use of different names. Your participation in this research is greatly appreciated.

#### **General Instructions and Information**

1. All individual responses to this questionnaire will be kept STRICTLY CONFIDENTIAL and for academic research purposes only
2. This questionnaire is divided into three parts

***Part 1: Personal details about respondent***

***Part 2: Questions about your personal lifestyle***

***Part 3: Questions on your brand perception***

3. Please do not worry about questions that seemingly look alike. If you do not have the exact answer to a question, please provide your best judgement by ticking the appropriate boxes in the questions. Your answers are very important to the accuracy of the research

4. If you wish to make any comment, please feel free to use the space at the end of the questionnaire

5. It will take approximately 10 minutes to complete the survey.

### **Part 1: Personal details**

1. *Your gender*

- |    |        |
|----|--------|
| a) | Male   |
| b) | Female |

2. *Your age group*

- |    |          |
|----|----------|
| a) | 18-24    |
| b) | 25-35    |
| c) | 36-50    |
| d) | Above 50 |

3. *Please state your occupation*

4. *Please indicate your current position or role*

5. *Country of residence*

- |    |                |
|----|----------------|
| a) | Ghana          |
| b) | United Kingdom |

### **Part 2: Lifestyle**

6. *What is your preferred Smartphone?*

7. *How long have you used your current brand of Smartphone*

8. *If you decide to change your Smartphone, what do you normally opt for?*

- |    |                          |
|----|--------------------------|
| a) | An Upgrade of same brand |
| b) | New brand                |

### **Part 3: Brand Perception**

9. *Could you explain if derive some recognition from the brand symbol*
10. *Could you tell me if your preferred brand reflect your personality*
11. *Please could share with me how satisfied you are with the quality of your Smartphone*
12. *You explained above how satisfied you are with the quality of your Smartphone, again, could you share with me how satisfied you are in terms of its functions?*
13. *Please would you explain to me how distinct your Smartphone is from others*
14. *Please would you try other brands of Smartphones even though you mentioned that you are satisfied with current brand?*
15. *Would you consider upgrading this brand of Smartphone, even if new Smartphones are launched by competitors?*
16. *Please could you tell me if you will continue to buy your preferred brand of Smartphone irrespective of price?*
17. *Please would you recommend to a friend?*

## **Appendix B**

### **Semi-Structured Interview Questions**

#### **BUILDING RESISTANCE TO BRAND SWITCHING DURING DISRUPTIONS IN A COMPETITIVE MARKET: AN IDENTITY THEORY PERSPECTIVE**

##### ***Part I: Personal Information***

1. *Select your age group?*
  - a) 18-24
  - b) 25-35
  - c) 36-50
  - d) Above 50
2. *Please state your occupation*
3. *What is your current position or role?*
4. *Country of residence*
  - a) Ghana
  - b) United Kingdom
5. *Please state your preferred Smartphone*

##### ***Part II: Brand Perception***

6. *Could you explain if you derive any form of pride by using a particular brand of Smartphone?*
7. *Could you tell me if your preferred brand of Smartphone reflect your personality and values?*

8. *Please are there any particular reasons why you will continue to buy your current brand of Smartphone irrespective of other innovative brands by competitors*
9. *Would you recommend the Smartphone brand to friends and family?*

## **Appendix C**

### **INFORMATION SHEET**

#### **BUILDING RESISTANCE TO BRAND SWITCHING DURING DISRUPTIONS IN A COMPETITIVE MARKET: AN IDENTITY THEORY PERSPECTIVE**

Your participation in this research is being sought as a user of a particular brand of Smartphone. The research questions that follow seek your cooperation to give your valuable opinion which will contribute to the success of this research. Information contained in this document is intended to help you understand what you might expect to do, and what is involved in this project. Please feel free to request further clarification before deciding if you want to take part in this research.

The purpose of the research is to carry out an investigation into identity theory and brand loyalty in order to empirically examine the effects of identity on customer loyalty and switching behaviour based on the symbolic interaction of customers. It is expected there will be implications for marketers. Primary data collection for this project will be carried out from August, 2016 to January, 2017.

Participant selection will be based on judgemental sampling of users of Smartphones. Participation in this study is absolutely voluntary and if you wish to take part, you will need to sign the attached consent form. By right, you may also withdraw at any time during this process without penalty. Also, participants have the right of anonymity as they will be identified by different names and data collected from participants will be used purely for an academic purpose.

It is hoped that your participation will generate data for analysis on the subject matter for this study and the findings will help in achieving the aims of this research outlined earlier.

For further clarification please contact the researcher:



Dominic Appiah

**(PhD Candidate)**

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## **Appendix D**

### **COVERING LETTER**

#### **(Interviews)**

#### **BUILDING RESISTANCE TO BRAND SWITCHING DURING DISRUPTIONS IN A COMPETITIVE MARKET: AN IDENTITY THEORY PERSPECTIVE**

**Dear Participant,**

I am a postgraduate researcher at the school of business, University of Plymouth, United Kingdom. I am currently undertaking a PhD research project on the topic indicated above, under the supervision of Professor Kerry E. Howell. This is an invitation to participate in my thesis.

The 20-25 minute interview session seeks your valuable opinion which will contribute to the success of this research. You can absolutely be sure that all information you provide will be strictly confidential and used for academic research purposes only.

The findings from your interview, and others will be used as the main data set for my thesis at Plymouth University.

Thank you for making the decision to take part.

Yours sincerely,

*D. Appiah*

Dominic Appiah

**(PhD Candidate)**

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## **Appendix E**

### **COVERING LETTER**

#### **(Survey Questionnaire)**

#### **BUILDING RESISTANCE TO BRAND SWITCHING DURING DISRUPTIONS IN A COMPETITIVE MARKET: AN IDENTITY THEORY PERSPECTIVE**

**Dear Respondent,**

I am a postgraduate researcher at the school of business, University of Plymouth, United Kingdom. I am currently undertaking a PhD research project on the topic indicated above, under the supervision of Professor Kerry Howell. This is an invitation to you to participate in my thesis.

This open ended questionnaire which takes approximately 10-15 minutes to complete, seeks your valuable opinion which will contribute to the success of this research. You can absolutely be sure that all information you provide will be strictly confidential and used for research purposes only.

The data from your participation and others will be used as the main data set for my thesis at Plymouth University.

Thank you for making the decision to take part.

Yours sincerely,

*D. Appiah*

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## **Appendix F**

### **CONSENT FORM**

#### **BUILDING RESISTANCE TO BRAND SWITCHING DURING DISRUPTIONS IN A COMPETITIVE MARKET: AN IDENTITY THEORY PERSPECTIVE**

I have read and understand the information provided in the information sheet and covering letter as well as the conditions of this project, I understand that I am free to withdraw from the study at any time. Again, I agree to provide information to the researcher under the conditions of confidentiality.

Also, I confirm that the researcher, Dominic Appiah has explained to me the purpose of the study and I give my voluntary consent for participation in this research.

I hereby sign and retain a copy of this form.

<b><i>Participant's Name:</i></b>
<b><i>Signature:</i></b>
<b><i>Date:</i></b>

For further clarification please contact the researcher:

Dominic Appiah

**(PhD Candidate)**

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## **Appendix G**

### **Descriptive Statistics of Survey Participants**

<b>No</b>	<b>Age</b>	<b>Gender</b>	<b>Country</b>	<b>Smartphone</b>	<b>Occupation</b>	<b>Position</b>
1	25-34	F	Ghana	iPhone	Health worker	Junior staff
2	35-44	M	UK	iPhone	Procurement specialist	Manager
3	55-64	M	UK	Samsung	Security officer	other
4	35-44	M	UK	iPhone	Courier owner	Manager
5	25-34	M	Ghana	iPhone	Commercial officer	Junior staff
6	35-44	M	UK	Samsung	Healthcare asst.	Junior staff
7	35-44	M	Ghana	iPhone	Insurance underwriter	Executive
8	45-54	F	Ghana	iPhone	IT Consultant	Executive
9	35-44	M	UK	iPhone	Teacher	Other
10	25-34	M	UK	iPhone	Accountant	Manager
11	25-34	M	Ghana	iPhone	Logistician	Manager
12	25-34	M	UK	iPhone	Lecturer	Other
13	25-34	F	Ghana	Samsung	Banking professional	Other
14	18-24	F	UK	Samsung	Student	Other
15	45-54	M	Ghana	Samsung	Army officer	Other
16	25-34	F	Ghana	HTC	Librarian	Manager
17	35-44	M	UK	iPhone	Finance Exec	Executive
18	55-64	M	UK	HTC	Security office	Other
19	25-34	F	UK	Nokia	Pharmacist	Manager
20	55-64	M	Ghana	Nokia	Merchant Navy	Manager
21	35-44	M	UK	iPhone	Warrant office	Junior staff
22	35-44	F	UK	iPhone	Nursery Nurse	Junior Staff
23	35-44	M	Ghana	HTC	Commercial Officer	Manager
24	25-34	M	Ghana	iPhone	Sound technician	Manager
25	35-44	F	Ghana	iPhone	Bar operator	Manager
26	18-24	M	UK	iPhone	Student	Other
27	18-24	M	UK	iPhone	Student	Other
28	18-24	F	UK	Samsung	Student	Other
29	25-34	F	UK	Samsung	Student	Other
30	35-44	F	Ghana	iPhone	Sound technician	Other
31	25-34	F	Ghana	iPhone	Unknown	Manager
32	55-64	F	Ghana	iPhone	Banking Professional	Manager
33	25-34	M	Ghana	iPhone	Banking Professional	Other
34	18-24	F	Ghana	iPhone	Student	Other
35	35-44	F	Ghana	iPhone	Banking Professional	Other
36	18-24	M	Ghana	Samsung	Student	Other
37	18-24	M	Ghana	iPhone	Student	Other
38	18-24	F	UK	iPhone	Student	Other
39	25-34	F	Ghana	iPhone	Procurement officer	Junior staff
40	35-44	F	Ghana	Samsung	Banking Professional	Junior staff

41	55-64	M	Ghana	iPhone	Politician	Other
42	18-24	F	UK	Samsung	Nursery Nurse	Manager
43	35-44	F	Ghana	Samsung	Health Worker	Other
44	25-34	F	Ghana	iPhone	IT Consultant	Executive
45	35-44	F	Ghana	iPhone	Accountant	Manager
46	18-24	F	Ghana	iPhone	Teacher	Other
47	35-44	F	UK	Samsung	Health Worker	Manager
48	25-34	F	Ghana	Samsung	Army Office	Other
49	25-34	M	UK	Nokia	Pharmacist	Other
50	35-44	F	UK	iPhone	Procurement specialist	Executive
51	18-24	F	UK	Samsung	Health Care Asst	Other
52	25-34	F	Ghana	iPhone	Lecturer	Other
53	55-64	F	Ghana	iPhone	Courier Owner	Executive
54	45-54	M	UK	iPhone	Teacher	Manager
55	25-34	F	UK		Health Care Asst.	Other
56	45-54	F	UK	HTC	Security Officer	Manager
57	45-54	M	UK	HTC	Librarian	Manager
58	45-54	F	UK	Samsung	Insurance underwriter	Executive
59	45-54	F	UK	iPhone	Teacher	Manager
60	18-24	M	UK	iPhone	Teacher	Other

## **Appendix H**

### **Descriptive Statistics of Semi-Structured Interview Participants**

No	Age	Gender	Country	Smartphone	Occupation	Position
1	18-24	M	Ghana	iPhone	MBA Student	Other
2	45-54	M	Ghana	Samsung	Entrepreneur	Executive
3	55-64	F	Ghana	iPhone	IT Consultant	Manager
4	55-64	F	Ghana	iPhone	Dentist	Other
5	35-44	F	Ghana	iPhone	Web Designer	Manager
6	18-24	F	Ghana	iPhone	Student	Other
7	25-34	M	Ghana	iPhone	News Editor	Manager
8	25-34	F	UK	Samsung	Lab Technician	Manager
9	45-54	M	UK	iPhone	Business Analyst	Executive
10	18-24	M	UK	Samsung	Customer Service Asst.	Other
11	25-34	M	UK	iPhone	Store Manager	Manager
12	55-64	F	UK	iPhone	Banker	Manager
13	25-34	F	UK	iPhone	Teacher	Other
14	55-64	M	UK	iPhone	Courier Owner	Executive



